Guide Outfitters of British Columbia: Strategic Plan

ECONOMIC & REGIONAL DEVELOPMENT AGREEMENT

Canada

BC

STRATEGIC PLAN FOR THE GUIDE OUTFITTERS OF BRITISH COLUMBIA

Prepared for:
Industry, Science and Technology Canada
Ministry of Tourism
Ministry of Regional and Economic Development

Funded by:
Canada - British Columbia Tourist Industry Development Subsidiary Agreement

Prepared by:
The DPA Group Inc.

January, 1991

91-03598/

For additional copies of this publication and/or further information about the Canada-British Columbia Tourist Industry Development Subsidiary Agreement, contact:

B.C. Ministry of Tourism
1117 Wharf Street
Victoria, B.C.
V8V 2Z2
(604) 387-6920

or

Industry, Science and Technology Canada
P.O. Box 11610
900-650 West Georgia Street
Vancouver, B.C.
V6B 5H8
(604) 666-0434

Canadian Cataloguing in Publication Data

Main entry under title:
Strategic plan for the guide outfitters of British Columbia

"Funded by Canada-British Columbia Tourist Industry Development Subsidiary Agreement".
On cover: Economic & Regional Development Agreement, Canada, BC.
ISBN 0-7726-1216-1

1. Hunting guides - British Columbia. 2. Hunting - Economic aspects - British Columbia. 3. Tourist trade - British Columbia. I. DPA Group Inc. II. Canada. Industry, Science and Technology Canada. III. British Columbia. Ministry of Tourism. IV. British Columbia. Ministry of Regional and Economic Development. V. Canada-British Columbia Tourist Industry Development Subsidiary Agreement. VI. Canada/BC Economic & Regional Development Agreement.

SK152.B7S77 1990 338.4'779929711 C90-092274-5

ACKNOWLEDGEMENTS

This study was funded through the Canada-British Columbia Tourist Industry Development Subsidiary Agreement. The Agreement, which provides a variety of programs for tourism development, is cost-shared equally by the governments of Canada and British Columbia. All of the activities undertaken through this Agreement are approved by a Federal/Provincial Management Committee Established for the administration of the Agreement.

The Canada-British Columbia Tourist Industry Development Subsidiary Agreement is one in a series of subsidiary agreements under the Economic and Regional Development Agreements (ERDA) signed in November 1984, between the governments of Canada and British Columbia.

The responsibility for the content of this report is the consultant's alone, and the conclusions reached herein do not necessarily reflect the opinions of those who assisted during the course of this investigation or the federal and provincial governments which funded the study.

Industry, Science and Technology Canada

Industrie, Sciences et Technologie Canada

British Columbia
Ministry of Regional and Economic Development

British Columbia
Ministry of Tourism

EXECUTIVE SUMMARY

INTRODUCTION

British Columbia has superb natural resources and wildlife populations which are recognized throughout the world. These features support a hunting experience which is sought after by tourists world-wide. The international demand for hunting is met by the guide outfitters industry, a significant tourism sector in British Columbia which generated $22 million in revenues in 1988.

The 255 active guide outfitters operating throughout the province are regulated under the province's Wildlife Act. Non-resident hunters are required to retain a guide outfitter to hunt in British Columbia. This service is provided by the guide outfitter industry under a system of territories where a single guide outfitter is limited to offering product within a geographically designated area.

In 1988, the Guide Outfitter Association of British Columbia (GOABC) collaborated with the Ministry of Tourism to undertake an opportunity analysis of the British Columbia guide outfitting industry and to document the industry's contribution to British Columbia's tourism sector.

This opportunity analysis study (Phase I) provided not only a comprehensive profile of the guide outfitter industry, its product and marketing practices, and its economic contribution to British Columbia, but also established some directions for future growth and development.

CHALLENGES FOR THE INDUSTRY

As the industry enters the 1990's, it faces some major challenges to its well-being. Foremost is the future of the wildlife resource upon which the industry depends for its livelihood. Competition from resident hunters, changing land use patterns which increase public access to remote areas and increases in non-hunting visitation into guide outfitter territories are all factors which can contribute to a depletion of wildlife. Guide outfitters are almost unanimously concerned with this situation.

The industry also faces image problems which have to do with the perception, held by some segments of the public, that hunting is somehow not a "good thing". As part of the effort to combat this "anti-hunt" sentiment, more information needs to be provided to the public on the important role which guide outfitters play as responsible resource managers who are seeking to ensure a sustainable environment for their tourism business. The ability to communicate this message and heighten awareness of the industry as small business enterprises practicing sound resource management principles is an important step for the industry.

PHASE II

Based on the results of the Phase I study and the GOABC's observations that members generally want to increase the profile of their industry and the effectiveness of their resource management, the theme adopted for this Phase II study is one of preparing a strategy to meet the challenges of the 1990's. The emphasis is on industry-wide activities and the specific objectives for Phase II are:

- *the preparation of an association strategy related to industry awareness, approaches to resource management issues*
- *an industry-wide marketing strategy emphasizing new target markets for the hunting product and approaches to marketing the non-hunting products*
- *increased efforts to assist individual industry members with product development in both the hunting and non-hunting areas.*

The methodology emphasized personal interviews with agencies and associations which could play a role in the development and marketing of the guide outfitting industry. These interviews included provincial and federal government agencies, tourism sector associations, regional guide outfitter associations, recreational associations and individual tourism operators.

A STRATEGIC PLAN FOR THE 1990's

This Phase II report is presented in the form of a strategic plan for the guide outfitting industry. The plan is comprised of four programs and includes a management plan and budget. Two programs, industry awareness and issues management, are designed to increase the profile of the industry and provide a step-by-step approach to managing issues which face the membership. The two programs are complementary in that an increased understanding of the industry and its contribution to the tourism sector can serve to impart a greater understanding on the part of decision-makers who influence the guide outfitter business through regulations and policies.

To encourage improvements in the guide outfitting product and marketing effectiveness, industry-wide marketing and product development programs are also recommended. The former is oriented to the development of a fulfilment package and lure piece which will benefit all members of the industry. The product development initiative is oriented to individual guide outfitters who seek assistance in improving their hunting product and/or diversifying into non-hunting products.

Program 1 - Industry Awareness

The Industry Awareness program is designed to improve the profile of the industry and educate audiences about the role of guide outfitters in tourism, and their commitment to resource management and habitat enhancement. One of the key themes of this program is the provision of tools to enable the association to "launch" the awareness program. These include:

- *information on an industry-wide basis that profiles the industry in terms of specific themes (e.g. tourism sector, resource management)*
- *"newsletter" or "update" information for audiences in the province, designed to ensure ongoing awareness of the activities of the industry (published three times per year)*
- *regional fact sheets designed to assist regional guide outfitter associations to increase the awareness and profile of the industry in their respective regions.*

Sample profiles were developed as part of the study and are intended for use as a starting point for the GOABC. In addition, the awareness program includes provision for a media workshop for the Board of Directors of the GOABC to be conducted by a media specialist. It is anticipated that media relations will be an important part of the awareness program. The greater the understanding of the media and how it functions, the better equipped the industry will be to effectively communicate its message.

Program 2 - Issues Management

Guide outfitters face a number of critical issues which affect their livelihood. They range from resource management practices to the impact of new taxes on industry viability. An effective approach to these issues requires an appreciation of their complexity and the number of players that are involved. For example, in the resource management area there are several provincial agencies, in addition to the various interest groups and local organizations, that have a stake in any given resource management issue in the province. For its part, the GOABC has historically managed issues in the resource area through either the Board of Directors or Regional Associations, all on a volunteer basis. It is clear that this approach is no longer suitable, given the increasing attention on and competition for the wilderness resource. The GOABC itself has observed that they are no longer able to effectively address their resource issues. Therefore, a more formal process is recommended to ensure that the position of the industry continues to be properly represented.

The recommended process involves delegation of responsibility for issues management on behalf of the industry to a sub-committee of the Board of Directors with a mandate for:

1. *Establishing lines of communication with all agencies whose mandates have the potential to impact on the viability of guide outfitter's businesses.*

2. *Research and preparation of industry positions on each issue.*

3. *Ongoing communications with the lead agency involved in the issue to monitor the process and ensure that the industry position is considered.*

4. *A communications strategy that informs the GOABC membership and other involved groups and agencies about progress on issues and emphasizes a proactive and positive approach in interactions with agencies.*

5. *Use of partnerships with other organizations who may be affected by the issue to add a greater "voice" to the discussion and enable pooling of resources.*

An effective issues management approach will require coordination between the activities of the GOABC and regional guide outfitter associations. Efforts to effectively manage issues must be shared and the GOABC must assume a leadership position in overall coordination. The industry awareness program provides an important support function, designed to help broaden the understanding by agencies of the industry.

Program 3 - Industry-wide Marketing

Two key activities were identified for this program. The first involves the development of a fulfilment package in cooperation with the Ministries of Environment and Tourism. At the present time, there are several different agencies and associations involved in marketing the guide outfitter hunting product and each distributes different materials or different combinations of material that they believe will be of interest to the prospective hunter. A common and consistent package of information that can be used by all distribution channels, ranging from the Ministry of Environment mail-out program to material distributed by regional tourism associations, will ensure consistency in the message and will promote the professionalism of the industry. Funding support is recommended through the Ministries of Tourism and Environment, and corporate sponsors. Once a fulfilment package is developed, it is recommended that the GOABC and the Ministry of the Environment jointly manage the distribution of information as part of the Environment Ministry's mail-out program. At the same time, fulfilment packages can be distributed through the Ministry of Tourism, Regional Tourism Associations, and other channels.

The second marketing activity relates to the non-hunting product. The lack of a broad experience base in both marketing and providing non-hunting products makes it essential that guide outfitters build on the existing experience of other operators who have historically been active in this area. Recommendations here include:

- *that the GOABC work with the Ministry of Tourism to ensure representation in the Ministry's outdoor and adventure vacation guide*

- *that the GOABC provide support to the individual guide outfitter by distributing fact sheets on general trends and options for marketing to the non-hunting clientele (a sample fact sheet is included as part of this Strategic Plan)*

- *that marketing initiatives related to the non-hunting clientele be incorporated as part of workshops proposed for product development and business planning under the Guiding Initiatives Program (see below).*

Program 4 - Product Development

At the present time there are a variety of programs available to guide outfitters to help them improve the quality of their product and assist them with business planning. In addition to those specifically oriented to the guide outfitter industry (e.g. the guide area development plan) there are more generic business planning programs offered by the Ministry of Tourism, Federal Business Development Bank (FBDB), and others. For greatest effectiveness, it is recommended that the GOABC's product development program emphasize an approach which integrates these various components into workshops tailor-made for individual guide outfitters.

In 1988/89 a series of workshops for the industry was sponsored by the Guiding Initiative Program. These workshops provided the guide outfitter with key product and marketing information to enable them to conduct an assessment of their business. It is recommended that a second series of workshops be held to assist those outfitters who have decided to expand or diversify their business. The workshops would focus on integrating product and market analyses and the preparation of a business plan. Draft workshop materials are provided in this report.

Management Plan

To achieve the programs described above, a detailed management plan and step-by-step work program is required. As the strategic plan anticipates ongoing efforts on the part of the GOABC in implementing and maintaining the programs, some adjustment in GOABC management structure is required. These adjustments involve refinements in the manner in which the Board of Directors conducts its business to ensure that an appropriate focus is placed on the proposed programs and to spread the workload so that it does not strain the Board or its executive. The principles which have been used to guide the recommendations for changes in the management structure are:

- *that the GOABC Board of Directors must clearly lead and be involved in the implementation of the programs described in the Strategic Plan*

- *that a permanent sub-committee structure be established for the Industry Awareness and Issues Management programs, comprising Board members and possibly others drawn at large from the membership, with clear reporting responsibilities to the Board of Directors*

- *that a task oriented sub-committee be established to undertake the work required to achieve the fulfilment package*

- *that Board sub-committees be serviced by the Executive Director of the Association*

- *that linkages between the GOABC and regional guide outfitter associations be strengthened to the maximum extent possible*

- *that communication with the membership at large be strengthened and, more specifically, that a specific coordination function for this communication be established.*

Terms of Reference for each sub-committee, in the form of a step-by-step workplan, provide the basis for launching each program of the Strategic Plan. Strengthening regional linkages presents a somewhat greater challenge and one which the GOABC must carefully consider. One of the ways to achieve this is through regional representation on the proposed sub-committee.

Communication with the membership is fundamental to the continued effectiveness of the GOABC. Implementation of the awareness program and, in particular, the newsletter, offers an ideal opportunity for improving communication with membership.

The out-of-pocket budget for implementation of the programs is estimated to be about $72,000 in the first year and about $40,000 annually thereafter. The higher costs in the first year reflect extra expenditures associated with "launching" each of the programs.

The strategic plan presented in this report is designed to assist the industry in meeting the challenges presented by its operational and business environment on the one hand and assisting individual guide outfitters to maintain and enhance the viability of their businesses on the other.

While the investment in the first year is substantial, it will place the industry on a sound course toward achieving their aspirations as a strong and healthy contributor to British Columbia's tourism sector into the next decade.

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1.0 INTRODUCTION

British Columbia has superb natural resources and wildlife populations which are recognized throughout the world. Hunting has long been a tradition in the province and the British Columbia hunting experience is sought after by tourists world-wide. The international demand for hunting is met by the guide outfitters industry, a significant tourism sector in British Columbia which generated $22 million in revenues in 1988.

There are presently 255 active guide outfitters operating throughout the province. Their activities are regulated under the provisions of the province's Wildlife Act. The Ministry of Environment licenses guide outfitters and requires non-resident hunters to retain a guide outfitter to hunt in British Columbia. Guide outfitters operate under a system of territories where a single guide outfitter is limited to offering his product within a geographically designated area.

The primary product of a guide outfitter is a guided hunting experience - judged by many to be competitive internationally. According to an industry survey (1988) guide outfitters commanded one of the highest average per diem rates for their product in British Columbia. Notwithstanding their success, guide outfitters are seeking to improve their viability in the tourism sector; some by product refinement, others by diversification, and still others by more effective marketing. The Guide Outfitters Association of British Columbia (GOABC) is providing leadership in this regard and working with the provincial agencies to achieve improvements.

In 1988, the GOABC collaborated with the Ministry of Tourism to undertake an opportunity analysis of the British Columbia guide outfitting industry and to document the industry's contribution to British Columbia's tourism sector. Funded by the Canada/British Columbia Tourism Agreement, specific objectives of the opportunity analysis (the Phase I study) included:

- a profile of the industry's products and markets
- an estimate of the direct and indirect economic impacts of the industry
- identification of problems and issues facing the industry
- development of specific initiatives to encourage continued growth and development.

1.1 Scope and Purpose

The Phase I study provides an excellent framework for collaboration between the industry and the province to develop specific actions and plans for improving the industry's contribution to the province's tourism sector. As a result of the Phase I findings, the Ministry of Tourism and the GOABC proceeded to commission this Phase II study aimed at translating the Phase I initiatives into more detailed action plans. The Phase II study objectives are:

- to prepare industry marketing initiatives
- to prepare product development tools and an overall plan aimed at enhancing the potential for all operators to refine their existing product and develop new products
- within the context of industry marketing and product development actions, to prepare a management plan for the GOABC.

In addition to the collaboration between the Ministry of Tourism and the GOABC, consultation was also undertaken with:

- Ministry of Environment
- Ministry of Crown Lands
- other industry associations in the adventure/outdoor travel product business.

2.0 BACKGROUND

The structure and contents of the recommendations contained in this study were shaped by several factors including:

- the findings of the Phase I opportunity analysis
- consultation with the GOABC
- recent activities and perspectives of the Ministry of Environment concerning the guide outfitting industry
- provincial policy development concerning the use of backcountry resources in British Columbia
- trends in the tourism sector related to non-hunting backcountry experiences.

In this section, a discussion of the Phase I findings is provided, followed by a description of the areas of emphasis for Phase II.

2.1 Phase I Findings

In addition to the descriptive value of the Phase I report in profiling the guide outfitting industry, there was substantial analysis concerning the strengths, weaknesses, and potential of the industry. Key findings which have served to influence this Phase II study are discussed below.

Industry Strengths

The hunting product is the guide outfitter's premier product. Guide outfitters command a high average per diem for their hunting product compared to packages in other tourism sectors and their clients exhibit a high degree of satisfaction with its delivery. The utilization of industry capacity suggests that operators are also quite effective and expert in marketing the hunting product. Operators estimate that about 68% of their capacity to guide hunting clients was used in 1988. This product is clearly competitive on a world scale and, indeed, many observers from competing jurisdictions noted that the guide outfitter territory system is an important factor in the continued success of the industry.

A very important industry strength is found in the recognition by guide outfitters that sound resource management is fundamental to their continued success. To that end, there is considerable evidence of individual guide outfitters and the GOABC devoting time and resources to both implementing and encouraging sound resource management practice. These activities range from the preparation of individual guide area development plans to collaboration with the province and others on resource enhancement projects.

The industry association, the GOABC, is strong and represents the majority of guide outfitters (about 180 of the total 255 operators). The GOABC plays an important role in providing services to its members, publication of a magazine, and representation to government on issues and concerns. The GOABC has also provided the mechanism for guide outfitters to collectively adopt standards of practice for delivery of their product. This is aimed at encouraging a high level of professionalism throughout the industry.

Individual operators and the GOABC all recognize the importance of improving their individual business practice and addressing issues challenging the continued success of the industry. This recognition has led to wide participation in guide outfitter programs offered by the Ministry of Environment, including the guide area development plans and marketing workshop programs.

Industry Weaknesses

Guide outfitters offer products in two general areas; hunting and non-hunting experiences. While the hunting product is the mainstay of the industry (89% of clients), there are several areas where improvements can be achieved:

- more effective marketing to the close-in markets such as the northwestern U.S. states and, possibly, the British Columbia lower mainland area (the Phase I findings indicate that the majority of hunting clients are from long-haul markets)

- the potential for successfully offering hunting services to British Columbia residents (the Phase I findings show that guide outfitters have historically not placed any emphasis on their resident market)

- regional differences in the guide outfitters' ability to deliver a quality product (eg. for reasons of shortage of wildlife, competing land uses, and, in some cases, inactive and under-utilized territories).

While capacity utilization is significant at about 68%, the analysis conducted during the Phase I study showed that increases in this utilization by about 10% would generate an additional three million dollars in revenue for the industry. In other words, about three hundred thousand dollars in revenue to guide outfitters would be generated by an increase in the existing utilization of about one percentage point. Therefore, actions to address these weaknesses (in fact they can be viewed as opportunities) can provide significant benefits to industry operators.

Another weakness associated with the hunting product, albeit marginal, relates to client expectations. In the Phase I survey of hunting clients, about 20% expressed dissatisfaction with the exaggeration they perceived in the marketing material as the product did not meet the "published" description offered by the operator. While this is not a significant percentage, it is important for the industry to address this concern, particularly given the GOABC standards of practise.

Inactive and under-utilized territories are a concern for the industry. The Phase I findings indicate that there are an estimated 23 inactive territories throughout British Columbia and a further 18-30 which can be considered as "under-utilized" (that is, the number of clients per season falls considerably short of the potential capacity to accommodate clients). Although small in number relative to the total number of territories, inactive territories are a concern to the Ministry of Environment who administer the guide outfitter territory system.

The greatest industry weakness, identified by guide outfitters themselves, relates to the potential for diversification into non-hunting products. During the Phase I study, they almost unanimously expressed an interest in this product but many expressed a general lack of understanding about how to develop a viable product, how to assess the potential of the market, and how to market non-hunting products effectively. From an overall industry perspective, guide outfitters who are interested in growth and development will inevitably have to look to the non-hunting product area. Although there is still some room to increase utilization of the hunting product capacity in the industry, this is somewhat limited by such factors as quota limits on wildlife, the scarcity of wildlife in certain areas of the province, competing land uses, and other resource-related factors. Non-hunting products such as photographic safaris, fishing, and wildlife viewing all offer alternatives for which guide outfitters can effectively use their existing facilities and satellite camps. Market potential also exists to expand in this area. The growth in the adventure travel segment of the market is well documented in the research work of agencies such as Tourism Canada and the B.C. Ministry of Tourism. Thus, a stronger move into non-hunting products is advantageous from a market perspective, particularly given existing trends in the market segments who would be attracted to the non-hunting product offered by guide outfitters.

The guide outfitting industry is a small, though significant small business community operating in rural areas of British Columbia. It faces many of the same challenges as any other industry sector in today's competitive environment. In this regard, one of the key weaknesses of the industry, recognized by the GOABC itself, is its need to promote the industry as a small business community with particular strengths and concerns. Creating a greater awareness of the industry will benefit members in many ways:

- more sensitivity to guide outfitter concerns in the regulatory and resource management areas
- greater understanding by financial institutions about the nature of the guide outfitting industry and its potential
- more opportunity to effectively collaborate with other organizations to promote the needs and concerns of small business.

This will require a focused effort directed to organizations such as the provincial government, local governments, the public, and other organizations and agencies. The GOABC has historically not placed a great deal of emphasis on these aspects of its role. In a similar vein,

guide outfitters expressed considerable concern about the sustainability of the wildlife resources which are central to their business. While they have a well documented track record in contributing to enhanced habitat and resource management in the province (eg. the Purcell Wilderness Conservation Area, grizzly bear research in southeastern B.C., habitat improvement in northeastern B.C.), the industry as a whole generally expresses frustration at their ability to make significant inroads in encouraging enhanced resource management. Issues such as competing land uses and increased access to the wilderness by the public are examples of issues identified in the Phase I study which guide outfitters continually address through the GOABC and regional guide outfitter associations. The extent of concern and frustration they express with their ability to satisfactorily deal with these issues provides evidence of the need to address this area. In particular, efforts at improving communications, increasing the profile of the industry and its contribution to the tourism sector, and rationalizing the approach to issues management by the industry are worth examining.

Industry Potential

The Phase I findings indicated that future growth and development of the guide outfitting industry generally lies in the following areas:

- resolution of inactive territories
- a marginal increase in hunter product utilization
- non-hunting product diversification
- improved resource management and habitat enhancement.

The hunting product area does not offer a great deal of scope for growth given that guide outfitters already experience relatively high utilization levels for this product. The Phase I report determined that about $3 million in annual revenues could be derived from a ten percentage point increase in utilization and resolution of inactive and under-utilized territories. Proportionally more opportunity for growth is offered in the non-hunting product area. This product appeals to an emerging market world-wide which is seeking specialized wilderness experience vacations but which has no interest in hunting per say. Guide outfitters in British Columbia are uniquely positioned to take advantage of this demand given their extensive knowledge of the wilderness, their experience as guides, and the physical plant which they have developed to serve their hunting clients. The Phase I report estimated that a 50% increase in the non-hunting client base would yield $1 million annually in incremental revenue.

Industry-Wide Issues/Challenges

The issue most frequently raised by guide outfitters themselves is concerned with the future of the wildlife resource base on which the industry depends for its livelihood. Competition from resident hunters, changing land use patterns which increase public access to remote areas, and increases in non-hunting visitation into guide outfitter territories (e.g. heli-skiing) are all factors which can contribute to a depletion of the wildlife resource. Guide outfitters are almost unanimously concerned with this situation. Indeed, there are many documented examples of

guide outfitters devoting a considerable portion of their own personal time and resources working on resource enhancement projects in cooperation with government and other resource users.

Access rights to non-hunting wilderness tourism products is another issue in the industry. The provincial government is now in the midst of developing a licensing policy for non-hunting wilderness activity. At this time, it is understood that a fundamental principle of this policy is the incorporation of fairness and equity in access to business potential for resource related activities through a competitive "bid process". Guide outfitters who are interested in the non-hunting product area must therefore prepare for this eventuality through such activities as product development and business planning. The fact that they have, for the most part, an existing physical plant well suited to offering non-hunting wilderness products stands them in good stead.

Another significant challenge facing the industry has to do with the perception, held by some segments of the public, that hunting is somehow not a "good thing". In an effort to combat the "anti-hunt" sentiment, more information needs to be provided to the public on the important role which guide outfitters play as responsible resource managers who are seeking to ensure a sustainable product environment for their tourism business. The ability to communicate this message and heighten awareness of the industry as small business enterprises founded under sustainable development principles is an important step for the industry. It touches not only on public perception but also on the degree to which guide outfitters can successfully meet the challenges presented by resource management and non-hunting product development issues described above.

The role of the GOABC in responding to industry challenges is critical to the industry's continued success. The GOABC was founded as an organization largely concerned with developing professional practice standards within the industry and marketing the industry's products. The new challenges which the industry faces dictate that it's own association also respond effectively to its mandate to protect the industry and encourage its growth and development.

Phase I Initiatives

The Phase I study concluded with a number of proposed initiatives designed generally to encourage future growth and development for the industry. These initiatives generally proposed:

- "fine tuning" the hunting product and marketing practices of the industry including implementation of industry-wide approaches that can benefit all members

- a comprehensive action plan for the non-hunting product area which establishes the direction for product development, defines markets, and identifies appropriate marketing channels that can be pursued by individual operators

- a role for the GOABC which embraces not only traditional services to its members but also a much wider role in promoting the industry's perspective to the various publics with which the industry interacts.

2.2 Phase II Emphasis

Based on the results of the Phase I study and the GOABC's observation that members generally wanted to increase the profile of their industry and the effectiveness of their efforts on resource management, the GOABC had opted for an emphasis which placed industry-wide activities as a priority. The GOABC also noted that there is major concern amongst its members about the proposed provincial policy related to Crown Land use and how it may affect their operations. The specific objectives established for Phase II were:

- **GOABC - Association Development Strategy**
  - industry awareness
  - approaches to resource management issues
  - inactive territory resolution

- **GOABC Marketing Strategy**
  - exploration of new target markets (hunting)
  - approaches to non-hunting marketing
  - industry-wide fulfillment package development

- **Product Development**
  - assessment of existing programs for guide outfitters
  - program needs for 1990

2.3 Methodology

The overall objective of this study was aimed at translating the Phase I initiatives into more detailed action plans. The methodology emphasized personal interviews with agencies and associations which could play a role in the development and marketing aspects of the guide outfitting industry. These interviews included both provincial and federal government agencies, tourism sector associations, regional associations, recreational associations and individual tourism operators.

As part of the study a survey of Lower Mainland hunters was conducted. The survey was intended to determine the potential interest of the Lower Mainland hunter for a guided hunt in B.C. A sample of 100 hunters from high income areas within the Lower Mainland completed the telephone survey and results are provided under separate cover.

3.0 INDUSTRY AWARENESS PROGRAM

Guide outfitters face major issues and challenges in the 90's. Competition for the resource base is increasing, not only from traditional resource industries but also from tourist and recreational users seeking wilderness experiences. Tourism operators throughout the province, recognizing British Columbia's internationally competitive resource base, are seeking to develop adventure travel products ranging from heli-skiing to mountain biking. This activity can have negative impacts on the wildlife habitat of the province, and in turn, on the guide outfitting industry. Other issues face the industry in the 90's; the need for a more receptive audience from financial institutions for product development (identified as a priority in the Phase I study by operators), and the efforts of the GOABC to achieve exemption from the GST are but two examples.

In securing a course to meet the challenges of the 90's, the GOABC itself recognizes that it must place more attention on increasing the profile of the industry to a wide range of audiences. This includes government agencies with which it deals with, local groups which have some influence on decisions affecting guide outfitters, interest groups such as resident hunters, and the public. The association further recognizes that it must strengthen its capability to address specific issues in an effective way. In discussion with the GOABC Board of Directors, both were identified as important activities for the association to be undertaken as part of their strategic plan.

In this section, a general industry awareness program is recommended. Section 4.0 of this report provides specific recommendations related to improving the GOABC's effectiveness in addressing specific issues such as those related to resource management and recognition by financial institutions.

Why an Awareness Program

Establishing and implementing a formal industry awareness plan is a new direction for the GOABC. Up to now, this function has been carried out on an informal basis, usually in response to specific issues. Part of the reason for this has been the lack of information on the industry, its role in the tourism sector, and its economic contribution to British Columbia. With the completion of the Phase I Opportunity Analysis Study, the association is in a much better position to commence a more formal awareness program, the benefits of which are:

- increased understanding of the industry's concerns and needs
- broader support for guide outfitters
- increased likelihood that guide outfitters will be consulted in decisions that can affect their future
- greater appreciation of the responsible approach which guide outfitters take to resource management and sustainable economic development.

3.1 Objectives

The objectives established for an awareness program for the GOABC are:

- to improve the profile of the guide outfitting industry, increasing awareness amongst government agencies (both provincial and local), other tourism sectors, and the public concerning the industry and its operators

- to educate target audiences about the role of guide outfitters and tourism and their commitment to resource management and habitat enhancement

- to promote the need for better resource management practices wherever possible

- to develop information and awareness tools to meet the objectives described above, covering such topics as:

  - resource use
  - economic impacts
  - guide outfitters as tourism businesses
  - sample profiles of good examples of resource management.

The emphasis is on industry-wide activities which the association can undertake in enhancing the profile of the industry and increasing awareness of its existence and its contribution to sustainable economic development in British Columbia. One of the key themes in the plan is the provision of specific tools to enable the association to "launch" the awareness program effectively. The plan should be regarded as a starting point for action by the association. As the GOABC proceeds with implementation, adjustments are certain to be made based on feedback from its members and the audiences which the association is targeting.

3.2 Program Elements

The structure of this awareness program has been developed around four key elements:

- **Audience and Messages**

  Defining the interest groups and agencies who are important audiences for the industry to communicate with and identify the message.

- **Tools**

  Developing tools, particularly informational tools, which industry spokespersons can use effectively in communicating the messages which the association wishes to convey.

- **Application of Tools**

Determining which tools should be applied to which audiences.

- **Management Plan**

Comprising a step-by-step approach for reaching target audiences.

3.3 Target Audiences and Messages

Several target audiences have been identified for the GOABC awareness program. They have been classified into three general categories based on their degree of influence on the operations of the guide outfitters (see Exhibit 3.1).

Direct Influence on Guide Outfitter Operational Environment

Federal government influence is exercised through such programs as the GST which can have a negative impact on pricing (and profit margins) of guide outfitter products. This is particularly important given that the majority of their clients are from international origins where price competitiveness, although not the primary concern, is a factor in customer product selection. Unlike provincial government policies which have a day-to-day influence on the industry, federal government impacts usually arise infrequently (e.g. the GST). Nevertheless, they can be significant. Rather than undertaking a general awareness program, it is more practical in this case to include industry profile material when interacting with the federal government on issues of concern to the industry. The recommended approach for addressing specific issues is outlined in Section 4.0.

By far the most important target audience is the **Provincial Government** itself. For the purpose of the awareness plan, this target audience has been divided into three general groups:

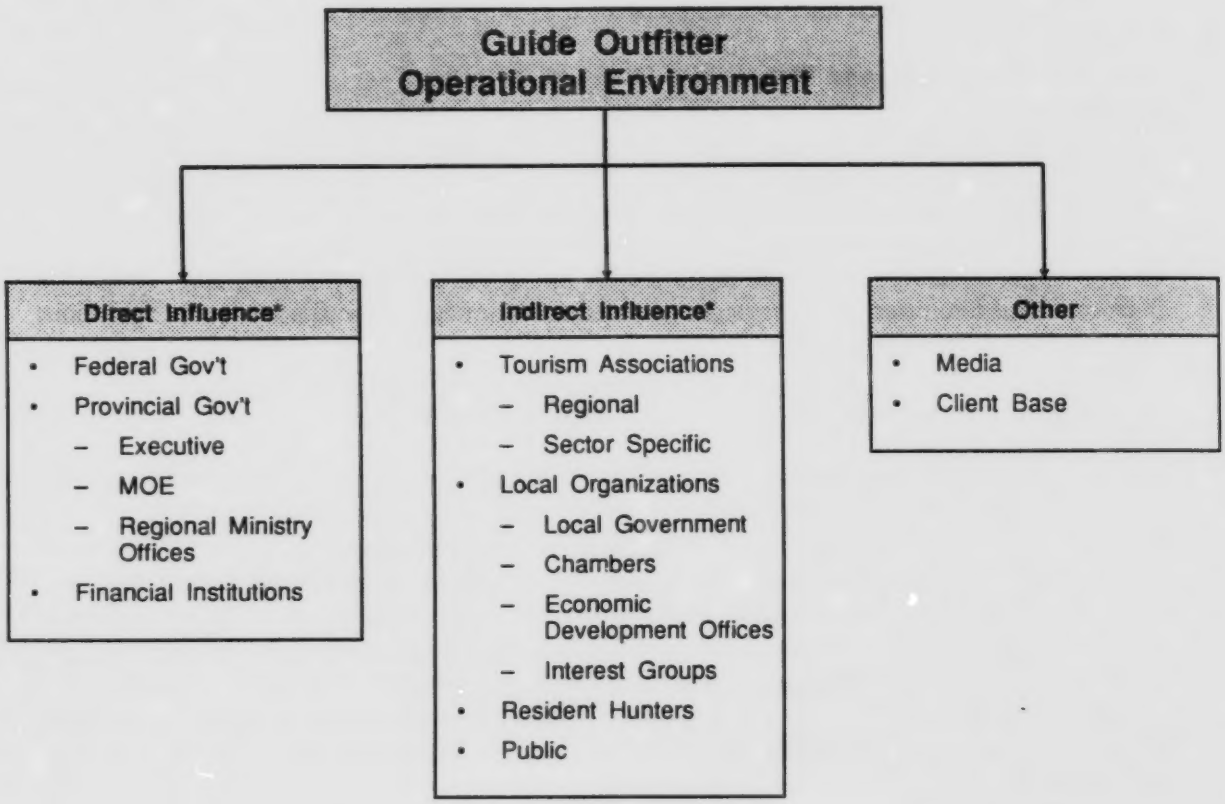
- Executive Level (Cabinet and senior government officials)
- Ministry of Environment, Wildlife Branch
- Regional offices of the Provincial government.

The purpose of the awareness program for the Provincial government is generally to:

1. Ensure that government representatives have a full understanding of the nature of the industry when they are addressing policies which can affect the industry.

2. Encourage a positive environment for ongoing dialogue and exchange of views based on credible industry information.

Exhibit 3.1: Target Audiences



* On guide outfitter operational environment

3. To raise the profile of the industry with Ministries whose interests and mandate are only indirect (e.g. Regional and Economic Development and Parks), but who are party to decisions affecting the industry.

Target audiences at provincial, executive and regional office levels include several ministries, the most important of which are:

- Environment
- Crown Lands
- Forests
- Tourism
- Parks
- Regional and Economic Development.

At the executive level in all ministries, it is also important to convey the position of the GOABC that guide outfitters play a significant role as small businesses in rural regions of British Columbia. These perspectives have not been emphasized sufficiently to date and are important ones for decision-makers whose general mandate is one of encouraging sustainable economic development in all of British Columbia's regions.

Ongoing development and management of the guide outfitter licensing and territory system is already well established with the Ministry of Environment. Here the effort must be to ensure that full lines of communication are maintained and that the GOABC continues its partnership relationship with the Ministry.

For other ministries the emphasis should be on ensuring that the perspectives of the industry are always considered by each ministry when addressing matters that can influence the guide outfitters operational environment. The commercial use of Crown lands for non-hunting wilderness experiences is a case in point in this regard.

Financial institutions play an important service role in the industry. The survey of operators in the Phase I study demonstrated that financing was a key operational concern of guide outfitters. Specifically, many found it difficult to secure financing given what they perceived to be a general lack of understanding and sympathy by these institutions towards the industry. Indeed, the incentive for federal and provincial program development involving financial assistance to the tourism sector is partly based on this problem. The GOABC can effectively work to overcome this constraint through a specific awareness program targeted to financial institutions. Now that the industry has comprehensive information on industry operations, revenues, and economic impacts, it is in a much better position to demonstrate the strengths and positive future of the industry to the financial community.

Indirect Influence on Guide Outfitter Operational Environments

There are several groups which can have an indirect influence on the industry. Examples include tourism associations, local organizations, and the public. In many cases, targeting an awareness program to these groups is strategic in nature; that is, motivated by the need for general support and understanding of guide outfitter's concerns. In other cases, the awareness program can provide general support to specific guide outfitters who are addressing an issue in any given part of the province and who must deal with local organizations such as communities or Chambers of Commerce.

Tourism associations include both regional and sector specific associations (such as the B.C. Fishing Resort and Outfitters Association). An awareness campaign with these associations is important for three reasons:

- to generally increase the profile and understanding of the Guide Outfitter's industry and its role in tourism
- to establish a "network" for the exchange of information on matters of concern to tourism businesses generally
- to establish the contacts necessary for entering into co-operative activities (e.g. combining resources to prepare position papers on issues).

Local organizations, be they local governments, Chambers of Commerce, or environmental groups, should not be ignored in the GOABC awareness program. The primary initial focus for these audiences should be directed to raising the profile of the industry, and increasing the understanding of the industry's contribution and the role of guide outfitters as responsible corporate citizens in each region of the province. The key message relates to guide outfitters as tourism businesses who follow a responsible approach to resource management. An awareness program directed to local organizations is particularly important with the increasing attention placed on the importance of British Columbia's wilderness resources. Building general support and appreciation for the guide outfitter's industry and its resource management practices is sure to help when guide outfitters encourage responsible use of resources in any given area, promote resource protection, and/or seek to increase the diversification of their products into non-hunting areas. For example, the support of local economic development officers and local Chambers of Commerce can go a long way towards assisting guide outfitters with such specific initiatives as habitat enhancement.

Both the GOABC and regional associations have already undertaken presentations to local organizations on several occasions. It is understood, however, that this has not been carried out as a formal program of the GOABC, nor has it been supported by the information tools presented later in this section. What is recommended here is a much more formal approach that is adopted as a specific program of the association on an ongoing basis.

Resident hunters represent an important target audience in that they "compete" for the wildlife resource on which the industry is generally based. Although not documented, it would not be surprising to find that resident hunters generally do not have a full appreciation of the industry and its economic contribution. Nor can one assume that resident hunters fully appreciate the efforts of guide outfitters in resource management and habitat enhancement. Since both groups depend on a sustainable wildlife resource, the main message should relate to resource management in the awareness program and be supplemented by information on guide outfitters as tourism businesses.

Increasing awareness about the industry to the **public** is a much greater challenge. Interaction with local governments and Chamber of Commerce, identified elsewhere in this section, will help in this regard. Nevertheless, an awareness program for the public is important since public opinion can play a significant part in the policy development process. An approach to increasing public awareness must, by definition, be long term in nature given the limited resources of the GOABC. The most practical approach is to begin at the regional level through such mechanisms as presentations to interest groups (e.g. local Chambers of Commerce and economic development agencies). This "indirect" method of reaching the public should be the first step in the GOABC awareness program given that it is cost-effective and complements the actions suggested for tourism associations and local organizations described above. Moreover, there is virtually no documentation on views of the public towards the industry. Therefore the reception to, and feedback on, industry messages at the local level will be very useful in shaping a more comprehensive public awareness program for the GOABC in later years.

Much of the concern with the public as a target audience is based on what the GOABC itself terms the emerging "anti-hunt" sentiment. The guide outfitters themselves can greatly enhance the effectiveness of the association's awareness program for the public by avoiding practices such as "kill" photographs in their marketing and advertising literature. Such material likely only serves to deepen the "anti-hunt" sentiment and, in any case, is not reflective of the "hunting experience" which guide outfitters sell as a product.

Other Audiences

The **media** can play an important role in raising public awareness. A general media approach involves several actions:

- getting to know the media and establishing media relationships
- providing background information to the media
- issuing press releases (either on a provincial basis or at the regional chapter level) for newsworthy events such as resource management products.

The role of the media has already been mentioned in relation to increasing general public awareness of the industry and its activities. The media is also important in providing a balanced view of issues affecting the industry such as the evolving government policy on commercial use of Crown lands. In this regard it is important for the GOABC to establish positive relationships with media representatives so that there is a greater chance for major news items related to the industry and concerns of the industry to be reported in a balanced fashion.

Managing media relationships effectively is rapidly becoming a science, particularly where issues are controversial. In the case of guide outfitters, managing the approach to the so-called "anti-hunt" sentiment is an important consideration. Expert advice on this to the GOABC could prove helpful for the association in interactions with the media. One approach to consider is retention of a media expert for a workshop (e.g. one day) on media relationships. This is likely to be of significant value in shaping the specific approach which the GOABC takes to ongoing interaction with the media.

Awareness of the industry and its product is highest with the industry's own **client base**. There is considerable room, however, to "educate" the client base about the industry objectives, perspectives, issues and concerns. Indeed, such programs as the standards of practice established by the GOABC are positive factors to convey to clients. They will indirectly benefit guide outfitters in improving client understanding of the industry as a responsible and professional sector.

3.4 Industry Awareness Tools

Informational tools to assist the GOABC in fulfilling its awareness function were identified by the Association as a major Phase II priority. Tools are proposed in three areas:

- **Profile** information on an industry-wide basis which describes the industry in the context of specific themes (e.g. tourism sector, resource management)
- **"Newsletter" or "update"** information for audiences in the province, designed to ensure ongoing awareness of the activities of the industry
- **Regional fact sheets** designed to assist regional guide outfitter associations to increase the awareness and profile of the industry in their respective regions

Profile Tools

Several sample profile sheets on the Guide Outfitter industry are presented in draft form at the end of this section. They cover the following topic areas:

- guide outfitters - a profile of the industry

- describes the guide outfitter as a regional tourism business
- summarizes the nature of a guide outfitter's product and market
- highlights the industry's economic contribution
- describes the world class competition which guide outfitters face in British Columbia
- profiles guide outfitter investment in resource management.

- guide outfitters - role in the tourism sector

  - focusing on the industry's economic contribution to the tourism sector and the "export" nature of guide outfitter businesses.

- guide outfitters and resource management

  - describes the importance of resource management to guide outfitter businesses
  - summarizes guide outfitter activity in land management, wilderness protection and wildlife management
  - highlights how guide outfitters regulate their own business practices.

All of these tools include the GOABC code of ethics. This code is very important in communicating the professional and responsible approach which guide outfitters take to serving their clients and protecting and enhancing the resource base on which their product depends.

Newsletters

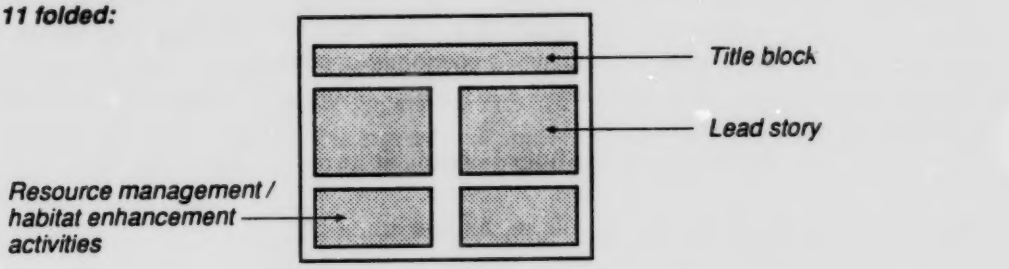
One informational tool which should be considered by the GOABC is a province-wide "newsletter" or "update". It should be oriented to such content as growth and change in the guide outfitter industry, guide outfitter activity around the world, current resource management and habitat enhancement projects of the association, and newsworthy items on the regional chapters, or individual guide outfitters (see Exhibit 3.2). A newsletter approach is important for establishing awareness of the industry's professionalism and attention to responsible resource management. It also serves to maintain a regular information flow to the target audiences and keeps them up-to-date on current issues facing the industry. The newsletter approach could start out on a modest basis; that is, published twice a year in desk-top publishing format without use of colour. It need only be about four pages to begin with (8-1/2 x 17" folded) and expanded as requirements dictate and resources allow. As such, it involves a low cost yet highly effective communication mechanism for the Association.

Regional Fact Sheets

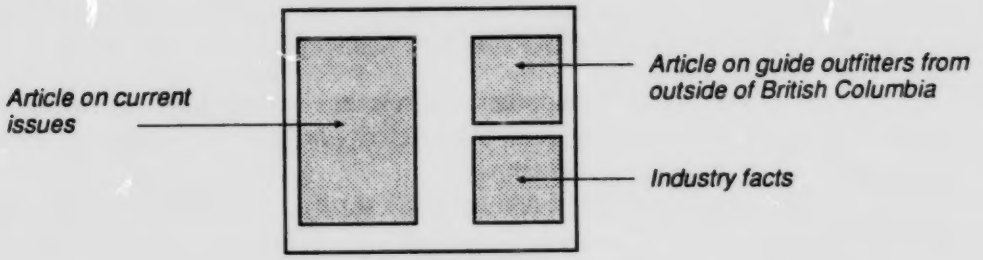
Regional fact sheets serve the same general purpose as the profile tools described above, but are oriented specifically to the region. As such, they are a much more focused instrument which serve to provide specifics about the guide outfitter regional chapter. They can be used as

Exhibit 3.2 Sample Newsletter Content

4 page - 8 ½ x 11 folded:



Front Page



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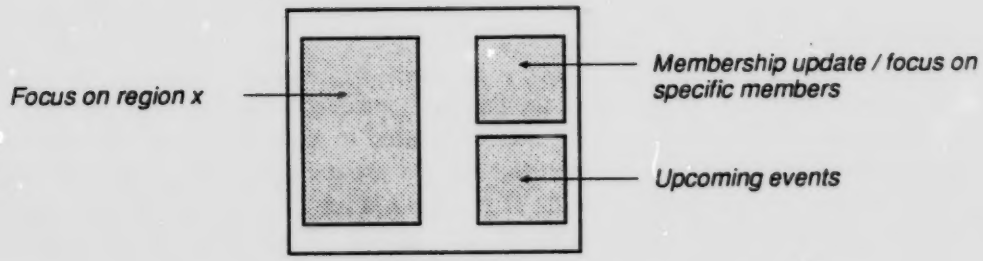

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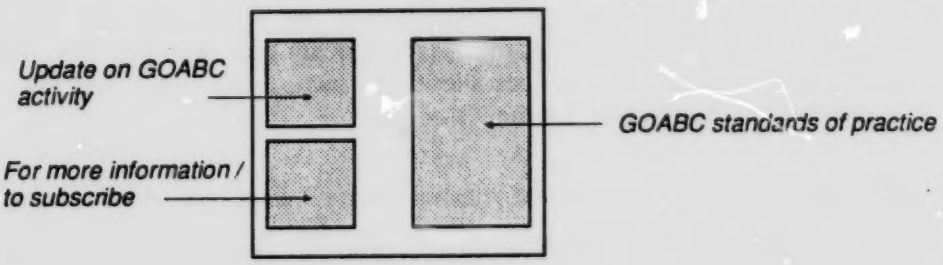


Back Page

presentation material or hand-outs to local organizations and government agencies in the region. A sample table of contents for regional fact sheets is shown in Exhibit 3.3.

Supplementary Tools

From time to time, the GOABC will need to prepare issue papers for submission to government decision makers on proposed policies or regulations which will affect the industry (see Section 4.0). The recent submission by the GOABC on guide outfitters and the GST is an example. Specifically prepared to put forward the position of the association, such papers can also serve a useful profile raising an awareness function simply by distributing copies to key organizations or individuals who might have some interest in the topic. It is also a useful way to share information with other groups who have similar concerns.

Western Guidelines

The GOABC already publishes an important document, Western Guidelines, which serves a valuable role in increasing awareness about British Columbia guide outfitters and their orientation toward delivering a high quality product while practising responsible resource management. As experience is gained with the informational tools developed as a result of this Phase II project, the GOABC should review the objectives and role for the Western Guidelines publication to determine if any modification should be made in future years.

3.5 Application of Awareness Tools

The core component of the awareness plan involves matching the information tools against target audiences identified in Section 3.3 above. The general approach recommended is summarized in Exhibit 3.4.

The tools have been classified into "primary" tools applicable to a specific target audience which are a must for matching guide outfitter industry information to the audience versus those tools which can serve as support in increasing awareness. This strategy should be regarded only as the starting point. It is fully expected that the GOABC will refine the approach as it gains experience with implementation of the awareness plan and monitors target audience feedback on its effectiveness.

3.6 Implementation of the Awareness Plan

The general steps required for implementing the awareness plan are as follows:

1. Refine the definition of target audiences and assemble a comprehensive mailing list.
2. Develop the capacity for production of informational tools including assignment of mechanisms and roles and responsibilities for preparation of items such as the "newsletter"/"update" and regional fact sheets.

Exhibit 3.3: Regional Fact Sheets: Suggested Contents

Introduction

- ❑ General Background
  - what is guide outfitting
  - size of industry
  - economic contributions
- ❑ Role of GOABC
  - representation
  - history
  - relationship to regional associations
- ❑ Map of Province highlighting region

Guide Outfitter Activities in Region

- ❑ Tourism Statistics (in province-wide context)
  - number of guide outfitters
  - what products do they offer
  - what are their markets
    - — size
    - — origin
  - who do they compete with
- ❑ The Small Business Message
  - purchasers of services
  - employers

Resource Management Practises

- ❑ Importance of resource management/habitat enhancement
- ❑ The industry position (province-wide)
- ❑ Activity in Region
  - examples of guide outfitter initiatives

Industry Standards

- ❑ Code of ethics

Exhibit 3.4: Strategy for Awareness Tools Application

Target Audience	Industry Profile	Newsletter/ Updates	Fact Sheets	Issue Papers
1. Direct Influence*				
Federal Gov't	✔			✔
Provincial Gov't				
- Executive	✔	✔		✔
- MOE	✔			
- Regional Offices of Ministries	✔	✔	✔	✔
2. Indirect Influence*				
Tourism Associations				
- Regional	✖	✖	✔	
- Sector specific	✖	✖	✔	✖
Local Governments	✔	✔	✖	
Local Organizations				
- Chamber of Commerce	✔	✖	✖	
- Interest Groups	✖	✖	✖	✔
Public				
Resident Hunters	✖	✖	✔	
3. Other				
Media	✔	✖	✔	
Client Base	✖	✖	✔	✔

** On guide outfitter operational environment*

✔ *Denotes primary tool*

✖ *Denotes supporting tool*

3. Determine the priorities for the upcoming year in commencing the awareness plan. Assign roles and responsibilities in accordance with the priorities.
4. Implement the priorities in accordance with (1) above.
5. Seek feedback from target audiences on the awareness plan and refine next years implementation accordingly.

A more detailed implementation plan is provided as part of the overall plan for implementation of the GOABC Industry Development Plan presented in this report (Section 7.0). Generally speaking, this approach does not require excessive resources or budgets to begin implementation. It does, however, require the commitment of the GOABC and its members to achieve intended results.

GUIDE OUTFITTERS - ROLE IN THE TOURISM SECTOR

The Guide Outfitter industry comprises 255 small businesses distributed throughout the province. Guide Outfitters are licensed to market and sell hunting experiences to British Columbia residents and to non-residents. In addition to hunting packages, the industry also offers other products such as sportfishing, trail riding, and wildlife viewing.

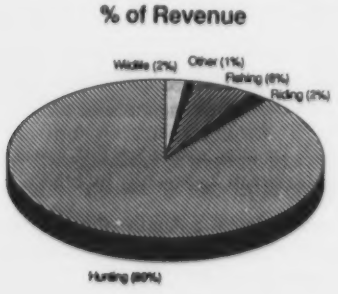
As an industry survey in 1988 concluded, Guide Outfitters are very successful at packaging their products, enabling the industry to charge a premium price for a hunting experience. Average per diems range from $300 for a moose to $738 for sheep, based on an average package of 9.7 days. The average package costs for clients in 1988 was $3,900. Only the top-end saltwater fishing and heli-skiing tourism products in British Columbia command similar per diems. When compared with other operators offering a similar product, Guide Outfitters are, in fact, successfully charging a per diem significantly higher than the industry average.

Regional Tourism Businesses

Although many think of Guide Outfitters as independent guides, they are fundamentally small tourism businesses which make an important contribution to the economic health of the province's tourism industry and to regions outside of the Lower Mainland. In 1988, 255 Guide Outfitter businesses provided 1,740 direct jobs, representing 5,240 person months of employment. Generating their revenues primarily from the sale of hunting experiences to non-resident clients, the industry in 1988 produced $22.1 million in revenue of which $16.8 million constituted payments in wages and salaries and the purchase of goods and services. Many communities benefit through guide outfitter expenditures on airlines, hotels, air charter services, equipment and provisioning.

An important feature of this industry from an economic perspective relates to the fact that over 90% of Guide Outfitter revenues come from non-residents of Canada. For hunting markets alone, 81% of clients originated from the U.S. markets and 15% from overseas markets. The proportion of non-resident revenue is much higher than for other tourism / recreation sectors in the province. The "export" nature of Guide Outfitter businesses points to industry revenues which largely represent tourist spending in Canada that would not otherwise occur.

1988 Guide Outfitter Industry: Product Profile



Source: 1988 Guide Outfitters Survey

1988 Guide Outfitter Industry: Economic Profile

No. of Guide Outfitters	255
Clients	
Hunting	5,600
Non-Hunting	5,150
Total	**10,210**
Client Days	
Hunting	48,900
Non-Hunting	23,300
Total	**72,200**
Revenues ($million)	
Hunting	19.6
Non-Hunting	2.5
Total	**22.1**
Revenue Distribution ($million)	
Wages and Salaries	8.4
Purchase, goods and Services	8.4
Capital return	5.3

Source: Extrapolated to total industry from 1988 Guide Outfitters

The Industry's Economic Contribution

Collectively, Guide Outfitter businesses in the province generate not only income in wages but also important indirect

impacts to the suppliers of goods and services to the industry. Total provincial impacts for 1988, after accounting for purchases made outside the province (less than $1 million) amounted to about $26 million income and 760 person years of employment.

Investing In Our Future

The investment of Guide Outfitter businesses on an original or purchase cost basis was an estimated $64 million in 1988. The industry has invested approximately $3.00 for every $1.00 of annual revenue generated. That investment, however, is only a part of the effort which Guide Outfitter businesses spend to enhance their product. They also make substantial contributions, both financially and through volunteer efforts to the proper management of wildlife in the province. The industry's activities include:

- financial contributions to conservation organizations (e.g. The Foundation for North American Wild Sheep, Safari Club International, Foundation for North American Big Game)
- bio-physical mapping (The Purcell Wilderness Conservancy)
- wildlife research (e.g. Flathead grizzly study, disease in Rocky Mountain Bighorn Sheep, Caribou logging interactions, Stone Sheep habitat use)
- contributions to Habitat Management
- support for the creation and maintenance of many of the province's wilderness areas.

Our Business Standards

In 1965, Guide Outfitter businesses formed an industry association to provide membership support services and to represent Guide Outfitter businesses with government and certain interest groups. One of the main features of the Guide Outfitters Association of B.C. (GOABC) is the emphasis placed on high standards of quality and professional practice. The Association, now representing 180 businesses, has adopted a code of ethics to which its members adhere in providing services to Guide Outfitter clients. This code of ethics is vital in ensuring that the industry continues to provide and improve on its competitive and secure product which it now offers.

For further information on our industry, contact:

The Guide Outfitters Association of British Columbia

100 Mile House, British Columbia V0K 2E0

☎ (604) 395-2438

Guide Outfitter Practise Standards

"An active member must hold a guide outfitter's license, or be a person actively engaged in the guiding industry, who, in the opinion of the GOABC board of directors should be granted active membership.

A member is required to provide and maintain stock, equipment, food supply and related facilities which are commensurate with those he has advertised to the public.

A member contravenes the code of standards who gives false or misleading information to prospective clients, and in particular, information relative to accommodation, available game species, terrain or equipment available. A member also contravenes the code who gives false or misleading information relating to guiding and outfitting fees and expenses.

A member must be familiar with the Wildlife Act (of B.C.) and other related statutes and regulations enacted thereunder, and at all times shall be in a position to advise both employees and customers of their rights and responsibilities whilst under his jurisdiction.

A member shall be willing and capable of making restitution, in cash or in kind, for breach of contract between himself and the customer where the customer is not at fault.

A member shall not cause, encourage or condone any violation of the Wildlife Act and/or related statutes and of the regulations passed thereunder and shall maintain high standards of public safety.

A member, while engaged in guiding, shall not kill game other than as required in the interest of human safety or to relieve the plight of injured game.

A member shall have particular regard to the provision of clean, sanitary accommodation and to promote the highest standards possible in the preparation of food.

A member shall practice sound wildlife conservation and promote and encourage its practice by others.

A member shall maintain a degree of proficiency, responsibility and professional standards satisfactory to the membership and standards of the GOABC."

GUIDE OUTFITTERS - A PROFILE OF THE INDUSTRY

Background

British Columbia has superb natural resources and wildlife populations which are recognized throughout the world. Hunting has long been a tradition in the province and the British Columbia hunting experience is sought after by tourists world-wide. The guide outfitter product generates the highest per person revenues of any tourism product in British Columbia.

Prior to 1948, individuals from outside the province seeking a British Columbia hunting experience retained a guide for that purpose. As a result of concerns with safety and standards, the province adopted a system of guide outfitter territories in 1948. Considered by many to be the most effective administrative arrangement for this kind of business found anywhere in the world today, guide outfitters are licensed to guide residential and non-resident hunters within a specific guiding territory, constituting a legally defined geographical area.

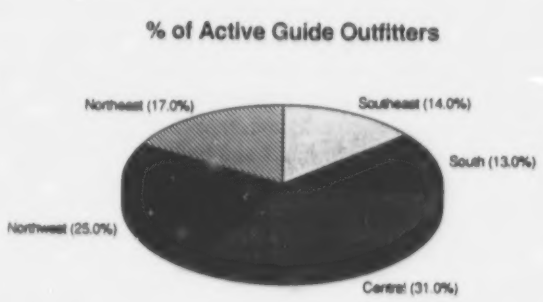
There are presently 255 active guide outfitters throughout the province. In 1965, the industry formed the Guide Outfitters Association of British Columbia (GOABC) to provide membership services and standards on professional practice, marketing, resource management and enhancement, and to liaise on behalf of industry with government. The association remains active to this day and now represents 180 licensed, professional guide outfitters.

Regional Tourism Businesses

Although many think of guide outfitters as independent guides, they are fundamentally small tourism businesses which make an important contribution to the economic health of British Columbia's regions outside of the Lower Mainland. In 1988, 255 guide outfitter businesses provided 1740 direct jobs, representing 5,240 person-months of employment. Guide outfitter businesses, though concentrated in the central and northwest regions of the province, are found throughout the province as shown in the adjacent table.

Guide outfitter businesses generate their revenues primarily from the sale of hunting experiences to non-resident clients. In 1988, the industry produced $22.1 million in revenue of which $16.8 million constituted payments in wages and salaries and the purchase of goods and services.

1988 Guide Outfitter Industry: Regional Profile



Source: 1988 Guide Outfitters Survey

1988 Guide Outfitter Industry: Economic Profile

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Non-Hunting	2.5
Total	**22.1**
Revenue Distribution ($million)	
Wages and Salaries	8.4
Purchase, goods and Services	8.4
Capital return	5.3

Source: Extrapolated to total industry from 1988 Guide Outfitters Survey

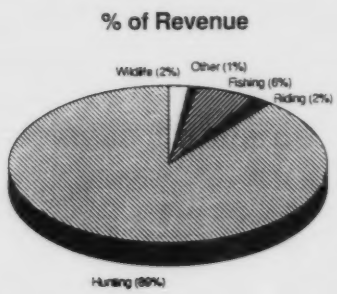
The industry has a long standing tradition of quality service and experience. The individuals who own the guide outfitter territory license and manage the business averaged 13 years as operators.

The Guide Outfitter Product

A typical guiding operation consists of a base camp and one or more satellite camps. The base camp, comprised of a lodge and cabins, serves as a starting point for the client's wilderness experience. Satellite camps support backcountry access requirements and are usually more rustic with tents being the more common accommodation. Transportation service provided by guide outfitters to access the backcountry is primarily through pack/riding animals and boats. In more remote regions of the province, such as the northeast and northwest, airplanes are a necessary form of transportation.

The primary product of guide outfitter businesses is hunting packages, regarded by the international marketplace as world class. In 1988, 89% of total industry revenues were derived from hunting packages.

1988 Guide Outfitting Industry: Product Profile



Source: 1988 Guide Outfitters Survey

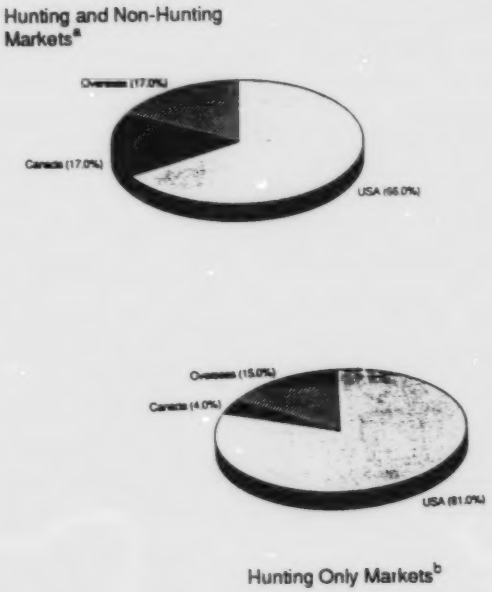
A much sought after experience, the industry is able to charge a premium price for guided hunting. Average per diems ranged from $300 for moose to $738 for sheep in 1988. At an average package length of 9.7 days, clients paid an average package cost of about $3,900.

Many guide outfitters are now offering non-hunting products such as sport fishing and wildlife viewing. Although generating lower average revenues per client, these packages offer an important diversification potential for the industry. Product diversification efforts also include more effort at offering hunting packages to residents of B.C.

Guide Outfitter Markets

The majority of guide outfitter clients originate from the U.S. (66%).

1988 Guide Outfitters Industry: Market Profile



a. 1988 Guide Outfitters Survey
b. 1988/89 Ministry of Environment Guide Outfitter records

For hunting markets alone, 81% of clients originated from U.S. markets and 15% from overseas markets. Guide outfitter clients demonstrate considerable loyalty to the British Columbia product. In a 1988 survey of hunters, 89% said that they were planning to purchase another hunt in British Columbia and, of these, 74% will return to the same guide outfitter. Quality and professionalism of service, promoted by the GOABC, is an important factor in ensuring that past clients will come back year after year.

The Industry's Economic Contribution

Collectively, guide outfitter businesses in the province generate not only direct income and wages but also important indirect impacts to the suppliers of goods and services to the industry. Total provincial impacts in 1988, after accounting for purchases made outside the province (less than $1 million) amounted to about $26 million in income and 760 person-years of employment.

1988 Guide Outfitters Industry: Provincial Impacts

	Direct	Indirect and Induced[a]	Total
Income ($million)	$13.7	$12.2	$25.9
Wages & Salaries ($millions)	$8.4	$8.0	$16.4
Employment (PY's)[b]	475	285	760

a. Indirect supplier related and induced consumer spending impacts from multiplier analysis
b. Person-years
Source: Extrapolated to total industry from 1988 Guide Outfitters Survey.

An important feature of the industry's economic contribution relates to the fact that over 90% of guide outfitter revenues come from non-residents of Canada. This percentage is much higher than for other outdoor recreation sectors in the province. The "export" nature of guide outfitter businesses points to industry revenues which largely represent tourist spending in Canada that would not occur otherwise, and hence result in a net injection of income to the provincial economy.

The Competition

British Columbia guide outfitter businesses compete for hunters with other destinations ranging from the U.S. to wilderness areas in Africa, Asia and the Soviet Union. Using a revenue measure, British Columbia is a market leader in the guided hunting business in North America and possibly the world. Our competitiveness, however, is very much dependent on the quality of our wilderness areas. The mainstay of our world class product from a client perspective; the wilderness experience, the quality of trophies taken, and the amount of wildlife observed all depend on effective resource management. This is equally the case for guide outfitter hunting products and the considerable potential for diversification into the non-hunting wilderness experience product area.

Investing In Our Future

The investment of guide outfitter businesses on an original or purchase cost basis was an estimated $64 million in 1988. The industry has invested approximately $3.00 for every $1.00 of annual revenue generated. That investment, however is only a part of the effort which guide outfitter businesses expend to enhance their product. Guide outfitters businesses have also made substantial contributions, both financially and through volunteer efforts to the proper management of wildlife in the province. The industry's activities include:

- prescribed burning to enhance elk, moose, deer, and sheep habitat in Northeastern B.C.
- habitat use and population dynamics of stone sheep
- habitat use by elk in prescribed burn areas
- cougar and coyote predation impacts on Bighorn Sheep - Junction herd
- logging impacts on cariboo habitat
- rehabilitation of Rocky Mountain Sheep in Southeastern B.C.

The motivation for guide outfitters to undertake these activities rests in the fact that they are in the business of packaging and marketing and selling a total wilderness experience. Whether a hunting or non-hunting product, the ingredients are the same; a remote or backcountry wilderness setting, sustained wildlife population, and a professional knowledgeable guiding service. Thus they operate businesses that are fundamentally dependent on a sustainable wilderness and wildlife habitat environment.

The worldwide increase in the wilderness travel market offers substantial business growth potential for the industry. British Columbia is better "positioned" than most to take full advantage of these market shifts and to encourage economic diversification in the province's regions. The province is endowed with remote wilderness, majestic scenery, and wildlife populations that are the very qualities these specialized markets are seeking. The Province's new emphasis on sustainable economic development is a welcome initiative and one which will help to ensure that guide outfitter businesses thrive and prosper. The incentive for sustainable economic development for guide outfitter businesses

and for the province generally is fundamentally a sound business development strategy.

Improving Our Business Practice

Guide outfitter businesses place considerable emphasis on a high standard of quality and professional practice, recognizing its importance in offering competitive, safe and secure product. The Association, now representing 180 businesses, has adopted a code of ethics to which its members adhere in providing services to the industry's clients.

For further information on our industry, contact:

The Guide Outfitters Association of British Columbia

100 Mile House,
British Columbia V0K 2E0

☎ (604) 395-2438

Guide Outfitter Practise Standards

"An active member must hold a Guide-Outfitter's license, or be a person actively engaged in the guiding industry, who, in the opinion of the GOABC board of directors should be granted active membership.

A member is required to provide and maintain stock, equipment, food supply and related facilities which are commensurate with those he has advertised to the public.

A member contravenes the code of standards who gives false or misleading information to prospective clients, and in particular, information relative to accommodation, available game species, terrain or equipment available. A member also contravenes the code who gives false or misleading information relating to guiding and outfitting fees and expenses.

A member must be familiar with the Wildlife Act (of B.C.) and other related statutes and regulations enacted thereunder, and at all times shall be in a position to advise both employees and customers of their rights and responsibilities whilst under his jurisdiction.

A member shall be willing and capable of making restitution, in cash or in kind, for breach of contract between himself and the customer where the customer is not at fault.

A member shall not cause, encourage or condone any violation of the Wildlife Act and/or related statutes and of the regulations passed thereunder and shall maintain high standards of public safety.

A member, while engaged in guiding, shall not kill game other than as required in the interest of human safety or to relieve the plight of injured game.

A member shall have particular regard to the provision of clean, sanitary accommodation and to promote the highest standards possible in the preparation of food.

A member shall practice sound wildlife conservation and promote and encourage its practice by others.

A member shall maintain a degree of proficiency, responsibility and professional standards satisfactory to the membership and standards of the GOABC."

GUIDE OUTFITTERS AND RESOURCE MANAGEMENT

INTRODUCTION

The Guide Outfitters industry of British Columbia originated in the 1800's with local packers who catered to Englishmen interested in hunting and exploring the back country of British Columbia. In the early part of this century, the province decided to licence guides and require non-resident hunters to hire a guide. Safety rather than economic or other arguments was cited as justification for this regulation. Until 1948, the Guide Outfitters generally operated in separate areas through gentlemen's agreement. In that year, the Guide Outfitters requested and received a new system of Guide Outfitter territories where a single Guide Outfitter would operate in a geographically defined area. This system is now considered by most to be the most effective administrative arrangement for this kind of business found anywhere in the world today.

Guide Outfitters are governed by the Wildlife Act. This Act imposes several conditions on Guide Outfitters businesses for their practice:

- ensure that each client is properly licensed to hunt in the province and to pay royalties to the Crown
- report annually on the number of clients served and the harvest taken
- adhere to quota's which may be set by the Wildlife Branch limiting the number of animals of a particular species that can be taken by Guide Outfitter clients.

Under the quota system, allocation agreements are struck annually between the Guide Outfitters Association of British Columbia and the British Columbia Wildlife Federation (representing the resident hunters of the province). When the available harvest is limited, resident hunters have first priority, followed by other Canadians and hunters from outside Canada.

The Importance of Resource Management

Guide Outfitter businesses offer a total wilderness experience. Whether a hunting or non-hunting product, the ingredients are the same; a remote or backcountry wilderness setting, sustained wildlife populations, and a professional and knowledgeable guiding service. The industry generates $22.1 million in gross annual revenues and makes an economic contribution to the province of $29 million in income, $16.4 million in wages and salaries, and generates 760 person years of employment.

The businesses that Guide Outfitters operate are fundamentally dependent on a sustainable wildness wildlife habitat environment. While the worldwide increase in wilderness travel offers substantial growth potential for the industry, the quality of the resources which are the mainstay of the Guide Outfitter product as well as other wilderness travel products in British Columbia must be carefully managed.

Guide Outfitters and Land Management and Wilderness Protection

Guide Outfitters have played a pivotal role in creating and maintaining many of the provinces wilderness areas. Mount Assinaboine Provincial Park, the Purcell Wilderness Conservancy, Spatsizi Wilderness Park and the Height of the Rockies are examples of wilderness areas created, in part, through the efforts of Guide Outfitters. In 1988, Guide Outfitters and other local groups set up a "Wilderness Defense fund" to ensure the proper protection and management of the Purcell Wilderness Conservancy and surrounding area. Several Guide Outfitters in the East Kootenays made financial and time contributions to the protection of the height of the Rockies area, even though their territories were not located there.

Guide Outfitters and Wildlife Management in British Columbia

Guide Outfitters have also made substantial contributions, both financially and through time, to the proper management of wildlife in the province. Conservation organizations, such as the Foundation for North American Wild Sheep, Safari Club International, Shirka-Safari, Rocky Mountain Elk Foundation, Foundation for North American Big Game and others, are financially supported through trips contributed by Guide Outfitters and auctioned to members at the annual meetings of these organizations. These direct contributions are intended to enhance resource management efforts. The auctioned trips are valuable, and in most cases, could be sold by the Guide Outfitter at these same conventions. The majority of funds raised are invested in wildlife management across the continent. However, as the British Columbia industry is a major contributor, substantial funds are allocated to the province. For example, the Foundation for North American Wild Sheep has spent in excess of $100,000 annually in British Columbia for the last several years.

Guide outfitters have also contributed directly to specific wildlife management projects. The biophysical mapping of the Purcell Wilderness Conservancy Area was financed to a large degree with contributions by Guide Outfitters. Grizzly bear research in the southeast corner of the province is the longest ongoing bear research in the world today, and has been supported by the Southern British Columbia Guide Outfitters Association.

Other projects in which GOABC members have played a role include:

- prescribed burning to enhance elk, moose, deer, and sheep habitat in northeastern B.C.
- habitat use and population dynamics of stone sheep
- habitat use by elk in prescribed burn areas
- cougar and coyote predation impacts on Bighorn Sheep - Junction herd
- logging impacts on cariboo habitat
- rehabilitation of Rocky Mountain Sheep in southeastern B.C.

A cornerstone in guide outfitter resource management efforts is the Guide Outfitter Wildlife Enhancement Fund. With funding support from the Ministry of Environment and from individual GOABC members on a project basis, guide outfitters provide expertise, labour, and financial contributions for enhancement projects. Coordinated by the GOABC, recent projects have included fencing to reduce wildlife / auto interaction in the Grand Forks area, and a variety of small scale habitat improvement projects throughout the province.

The habitat management program for wildlife in northeastern British Columbia has received major financial inputs from the provincial government, investments by the Habitat Conservation Fund, donations from resident and non-resident hunters, international conservation organizations and local Guide Outfitters. On an individual basis, non-residents contribute six times more than resident hunters to the Fund. The Guide Outfitters have assumed responsibility for carrying out the enhancement projects. Guide Outfitters in other parts of the province have contributed to cariboo research programs, mule deer and sheep enhancement programs and a variety of other wildlife related projects.

Although guide outfitters may benefit in the long term from these projects, their contributions were made in the spirit of improving wildlife management and opportunities for all wildlife users in the province. Much of the money, for example, contributed by non-resident hunters and guide outfitters to the Habitat Conservation Fund is used to finance enhancement work for species such as the pileated woodpecker, long-billed curlew and white pelicans.

The industry has a long-standing tradition of concern for the wildlife resource. For three decades the GOABC has directed its efforts to improving wildlife management and has led the fight for an improved resource management policy. Individually, Guide Outfitters have a reputation for being conscious of their responsibilities and conscientious about the need to manage wildlife for the long-term benefit of all users.

For further information on our industry, contact:

The Guide Outfitters Association of British Columbia

100 Mile House,
British Columbia V0K 2E0
☎ (604) 395-2438

Regulating Our Own Business Practices

In addition to investment of funding and volunteer time, Guide Outfitters also place considerable emphasis on high standards of quality and professional practice for their own members. The GOABC, now representing 180 Guide Outfitter businesses, has adopted a code of ethics to which its members adhere in providing services to their clients.

Guide Outfitter Practise Standards

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A member shall maintain a degree of proficiency, responsibility and professional standards satisfactory to the membership and standards of the GOABC."

4.0 ISSUES MANAGEMENT

Guide outfitters face a number of critical issues which can potentially affect their livelihood. Whereas the awareness program described in Section 3.0 was directed toward general profile raising and awareness of the industry's important role in the tourism sector, there continues to be a real need for the association to tackle such issues directly. In discussions with the GOABC, they indicated concerns with not only the sheer number of issues which need to be addressed, but also the resources that it takes from an essentially volunteer organization to deal with the issues effectively. They observed that a sound approach to issue management is a high priority for the association and a service which members identify as one of the industry's greatest needs.

The complexity of issues management from the perspective of the guide outfitters is well known. It bears repeating here using the example of the resource management area, simply to illustrate the need for instituting a formal approach.

Guide outfitters are dependent on wilderness resources, and specifically wildlife habitat and wildlife populations, to sustain the industry. Competition for the resource is increasing. As access increases by the public, industry, and other tourism operators, the effect in many cases is pressure on the wildlife population, negative impacts on wildlife habitat, and a general decline in the "wilderness" characteristics of guide outfitter territories. This in turn has a negative impact on the industry: guide outfitters sell a wilderness hunting or non-hunting experience and a diminished sense of wilderness on the part of clients will result in a general decline in the industry.

At the public sector level there are many agencies which play a role in the management and use of the natural resources. Provincial agencies which have a role to play include:

- Ministry of Environment, Wildlife Branch
- Ministry of Forests
- Ministry of Lands
- Ministry of Regional and Economic Development
- Ministry of Tourism
- Ministry of Parks

The roles that these agencies play are varied as well and include:

- setting policies to manage the resources
- establishing regulations for users of the resources
- developing strategies to encourage the use of the resources to create economic benefits
- acting as mediators to resolve resources use conflicts.

As the demand for the resources increases, the policies and regulations established by these agencies are fast becoming outdated. Over the past few years the agencies have initiated actions to change or refine policies and regulations to better fit the changing environment. The outcome of these initiatives can have either positive or negative effects on the viability of guide outfitter businesses. As a result it is imperative that the industry have an opportunity for input in the development of these initiatives. Some of the agencies already recognize the role of the guide outfitter and have approached the industry for comment. This is not the case in all situations. In some instances, input has not been requested from the industry.

The association has historically managed issues in the resource area through the Board of Directors or through regional associations on a volunteer basis; that is, through the efforts of individuals prepared to "take the issue on". It is clear, however, that this approach is no longer suitable, the evidence being not only the GOABC's own observations about their ability to handle all issues but also the increasing attention on and competition for, the wilderness resource. Therefore, in order to ensure that the position of the industry continues to be properly represented a more formal process is necessary whereby:

- the association makes specific assignments for issues management on an ongoing basis (for example, to a sub-committee of the Board of Directors)
- lines of communication with the agencies are established so that the industry has early warning of impending changes
- the industry prepares submissions which are well researched and provide constructive and fair input aimed at protecting guide outfitters businesses
- communication with the agencies is maintained so that the industry can track and communicate progress with membership.

This process, discussed in detail in the following sections, is equally applicable to issues of a business nature such as the GST and financing constraints. Following this discussion, the proposed process is applied to three management issues which the industry is currently facing.

4.1 Overall Process for Issues Management

1. Organizing to Manage Issues

The need for a more formal organizational approach to issues management is clear in the minds of the association and from the evidence of the increasing number of issues with which they have had to deal with in recent years. There are several options which could be considered:

- delegating responsibility to the executive director

- reliance on the Board of Directors and, particularly, the President of the association with executive director support
- a combination of Board of Director and regional association management
- a sub-committee of the board of directors.

Neither of the first two options are ideal; the executive director simply does not have the time given other duties related to servicing the board, and the board itself meets relatively infrequently and always has a full agenda. Given that issues management is ultimately a board level function, the preferred option is to establish a sub-committee charged with the mandate for overall issues management related to the industry. Comprising 4-5 members with services provided through the executive director, such a sub-committee could meet more frequently, focusing exclusively on progress related to issues.

The role of the subcommittee would be to priorize and coordinate the management of issues. Currently there are many situations where government agencies are making changes which have the potential to impact the industry. The need to respond to all of these initiatives requires a great deal of time. Therefore it is imperative that each initiative or issue be priorized to ensure that efforts are being directed to areas which have the greatest potential impact on the industry.

The subcommittee should also coordinate the various tasks outlined below for each initiative. The first step in this coordination is to determine if the efforts should be at the association level or regional level. From there the subcommittee could then identify individuals to complete certain tasks. The sub-committee would also be responsible for monitoring the progress and managing the communication strategy throughout the process.

2. Contact With Provincial Government Agencies

It is very important that the industry set up lines of communication with all agencies whose mandates have the potential to impact on the viability of guide outfitter's businesses. The initial contact with the agency is to inform the appropriate department or individual that the guide outfitter's industry would like the opportunity to provide input into any decisions which may impact the wildlife habitat and/or population. Once this initial contact has been made then it is important that periodic contacts be made to determine if the agency is considering any new initiatives. It is also important that this communication be maintained as the GOABC cannot assume that the agency will always come to them for input.

This contact should be developed at two levels; Victoria and regionally. Initiatives being developed through Victoria focus on revising existing and developing new policies and regulations. These initiatives tend to impact the province as a whole and most often require input from provincial associations such as the GOABC. Examples include the Ministry of Forests "Managing Wilderness in Provincial Forests" proposed policy framework and the Ministry of Environment's "A New Approach to Angling Guide Management". At the regional

level the agencies focus on regional planning issues and the outcome could impact guide outfitters within a specific area. Examples here include the current strategies being developed by the Ministry of Regional and Economic Development to identify regional tourism development opportunities and the Ministry of Forest's wilderness and 5 year logging plans. For the regional offices there is a requirement for the guide outfitters to be represented by the regional associations with the endorsement of the GOABC.

As the industry has limited resources and the amount of time that could be spent contacting the different agencies can be very high, it is important that the GOABC work with the regional associations to determine which agencies would be contacted and by whom. Priorities should be set to ensure that those agencies which have the greatest potential for impact to the industry be contacted more often than those that have less impacts.

This communications strategy overlaps with the activities described in Section 3.0 to increase the profile and the awareness of the industry. The recommendation is to tie the two strategies together. In meeting with the government agencies the individual or group would in fact perform two tasks:

- inform the agency of the industry's desire for input into decisions affecting the industry
- provide profile sheets to increase the agency's awareness and knowledge of the industry

3. Research and Preparation of Industry Positions

Once the GOABC or regional association have determined that an action is being taken by an agency which has the potential to impact the industry, the next step is to research the initiative and determine the industry's position. Research is very important in addressing any initiative as it ensures that correct information and assumptions are being used, that the issues are fully understood and that the stakeholder or players are clearly identified. Once the research is completed then the industry can determine the issues facing the industry and estimate the impacts. The industry's position on the specific initiative can then be determined.

The research efforts are usually not onerous. However, it will require that interviews are held with the appropriate individuals within the agency to:

- fully understand the initiative that is being proposed by the agency
- obtain details on the process, specifically to determine when the industry can provide input into the process and how the input will be used.

Interviews may also be required with those guide outfitters who will be affected by the agency's initiative. Researching the initiatives is a very important step as the information collected will be used to assess the impact of the agency's initiative. Therefore it is important that accurate information be collected and that the research is thorough.

The next step is to assess the initiative and determine the issues and impacts the initiative will have on the industry. At this point in time the association may require outside professional assistance in determining the impacts depending on the importance assigned to the issue.

The final step is to determine the industry' position on the specific initiative. Further action may be required by the association or industry as a whole and this will be determined at this stage. The outcome may only be that a submission be prepared or it may require that the GOABC must poll its members to determine the appropriate position for submission.

If the initiative is regional in nature the regional guide outfitter associations will be required to conduct this step themselves. The role of the GOABC would then be to provide assistance where possible and, if required, to review and endorse the regional associations submission.

4. Ongoing Communication with the Agency

Once a submission has been made it is important that the GOABC or regional association maintain communication with the agency to track the process. Details on the process are collected in the previous step and these should be monitored. There may be additional opportunities for the industry to provide further input. In addition, it is important that the process be monitored to ensure that the industry's submission is in fact incorporated into the initiative. A common mistake is to assume that once the submission has been made there is no need for further contact with the agency. Ongoing contact with the agency is imperative in ensuring that the guide outfitter's industry maintains a high profile throughout the process.

5. Communications Strategy

The most common reason why issues management efforts fail is due to a lack of communication. The GOABC has an excellent track record of bringing issues to the forefront in terms of its membership. For example, at annual general meetings the GOABC invites guest speakers and organizes panels to discuss and explore issues. This is a good start, but it is clearly no longer sufficient given increasing pressures on the resource base and instances where land use conflicts arise. Issues management must become an integral part of the activities of the GOABC and the regional chapters on an ongoing basis.

The second problem associated with the current approach by the GOABC is that the communications increasingly needs to be more widespread than can be achieved at annual general meetings. The GOABC must communicate to:

- all guide outfitters (newsletters and mailouts)

- to all interested government agencies including those who may play only a peripheral role

- other industry associations who may be affected by the issue.

The content of this communications and the tone in which it is delivered is critically important to a successful issues management program. A discussion of the issues and supporting documentation must be as accurate as possible. The tone of the discussion should be proactive and positive. Communication which is reactive generally tends to place the organization in a negative light and diminishes the chances for the industry to be taken seriously by the agencies.

6. Partnerships

In many cases an issue cannot be resolved instantly and it will require an ongoing process of discussions, communication, and monitoring. A successful issues management program is one in which guide outfitters will be perceived as part of the solution and not the problem. To that extent, the GOABC should consider "partnerships" with other organizations on a strategic basis to resolve the issue. A recent example of this is the communication which has been initiated with the freshwater fishing resorts and lodges who share common concerns with guide outfitters on land-use conflicts and the resource use decision making process. Partnerships have several advantages, the most important of which are:

- to add a greater "voice" to the discussion
- to enable pooling of resources to properly manage the issue on an ongoing basis.

4.2 Issue Specific Approaches

The process described above has been applied to three issues currently facing guide outfitters to demonstrate how each may be considered in an issues management process. These are:

- backcountry commercial recreation
- habitat enhancement
- inactive territories.

Backcountry Commercial Recreation

World tourism markets are increasingly expressing an interest in outdoor-wilderness tourism products. Responding to these markets results in an increase in demand for access to backcountry resources and what was once thought to be a vast area of wilderness is shrinking as this tourism demand increases. Currently, the Ministry of Crown Lands is receiving more and more applications for access to the backcountry by tourism operators. The problem currently facing the provincial government is that it does not have an adequate framework for making decisions on these applications that takes into account the concerns of other stakeholders and reflects the overall public interest. As a result, the provincial government initiated the

development of a backcountry policy for commercial recreation use. The policy development process includes involvement by the Ministries of Crown Land, Environment, Tourism and Forestry. A draft policy will be first reviewed by Cabinet prior to proceeding to a public review process. At this time, it appears that a "bid" process for backcountry access in a specific location and for a specific use is the preferred approach. From the perspective of the provincial government, fairness and equatability in the regulation of backcountry access for commercial recreation is of paramount concern and such a bidding process is one way to achieve this.

The final backcountry commercial recreation policy put in place by the provincial government will have many potential impacts for the industry, both positive and negative. At this early stage in the policy development process, it is very important for the guide outfitters to stake out a position as champions of sound resource management and of a policy which maximizes this principle. Guide outfitters must become part of the process rather than simply reacting to it.

In an issues management context, the recommended steps for the GOABC to take are:

1. Identify and assign one of the GOABC directors responsibility to manage the GOABC response and monitor the situation.

2. Undertake research on where the policy development process is at the present time, who is involved, and the likely schedule for a preliminary review by Cabinet and a public review process.

3. In consultation with GOABC directors, prepare an industry-wide response including a program for participation in the policy development process. One possibility here is to encourage the establishment of an inter-industry group partnership with other commercial recreation operators.

4. Initiate the preparation of an issue paper and distribute it to industry with two clear objectives in mind:

    - to inform other stakeholders of the policy development process
    - to encourage their participation.

5. Monitor the policy development process through contact with appropriate provincial government representatives and keep other stakeholder organizations informed.

6. Inform other industry organizations of the position and program of the GOABC and, where appropriate, jointly participate in the process of providing input to the policy.

These steps are directed at the role of guide outfitters as a part of the process. The GOABC must also be prepared to address the implications of commercial recreation policy alternatives in the event that, for instance, the bidding process is approved. Therefore, as part of the issues

management program, the GOABC should encourage guide outfitters to prepare for such a bid process.

Actions here include:

- the preparation of business plans and development plans at this time which ultimately will be required if guide outfitters are interested in bidding on commercial recreation opportunities in the territories

- encourage appropriate ministries to establish programs similar to the guiding initiative program.

Habitat Enhancement

Guide outfitters have long recognized the importance of habitat enhancement in maintaining their competitive position world-wide. In this case, guide outfitters have already established themselves as a "champion" of habitat enhancement practice and have developed a program, the Guide Outfitter Wildlife Enhancement Fund, as a positive element in their efforts. Under this program, initiated through the Guiding Initiative Program of the Ministry of Environment, the GOABC is responsible for the Wildlife Enhancement Fund in association with regional biologists of the Ministry. The Wildlife Branch of the Ministry of Environment sends out information on the Enhancement Fund with license renewals as one means of encouraging contributions.

The problem with this approach, from an issues management perspective, is that the fund is a well kept secret. Most industry organizations who are not directly involved in hunting are simply not aware of guide outfitter efforts in this regard.

To improve the GOABC role in habitat enhancement, several steps are recommended as follows:

1. Establish a communications program to highlight the fund and its importance not only to guide outfitters but to the wilderness characteristics associated with British Columbia (including presentations, a fact sheet, and newsletter articles as appropriate). This could be developed in association with the Ministry of Environment.

2. Inform other stakeholders of the existence of the Fund, how many dollars are spent on wildlife enhancement, where the priorities for expenditures are, the successes of the program, and how individuals and other industry organizations can get involved.

3. Communicate information on the fund to local government and interest groups in each region (as part of the awareness program discussed in Section 3.0 of this report).

To date, the Ministry of Environment has provided funding support for ongoing activities of the fund. The GOABC does receive some allocation for administration. Given the continuing concerns of the GOABC and its members for habitat enhancement, it is appropriate that the

GOABC significantly increase its promotion of this fund and its importance as a means of working with government to maintain British Columbia's wildlife resources.

There is always room for improvement and, to this end, the GOABC should also encourage "partnerships" in the program at all levels of government and with other stakeholders. For example, regional chapter representatives should discuss the fund with regional biologists and explore ideas for improvements and changes. The GOABC should perform this function at the provincial level. The awareness program (Step 3 above) is, in fact, the first step towards encouraging participation by other industries organizations such as freshwater fishing lodges and resorts, heli-skiing operators, and the like. Finally, the GOABC should provide an annual report on Fund activities and suggestions for changes and improvements to the guiding initiatives committee.

Inactive Guide Outfitter Territories

The 1988 Phase I report on the guide outfitter industry identified 23 inactive territories. There are many reasons for this situation including:

- loss of wildlife resources
- impacts on the wilderness experience by other resource users
- territories which are too small to be viable
- lifestyle choices on the part of the guide outfitter (for example, electing to guide only a few hunters).

This is a very sensitive issue and one which the GOABC has not fully addressed to date. However, it will not go away and eventually the Ministry of Environment as the responsible agent for guide outfitter territories must address it. Therefore it is important that industry be seen as concerned with the issue and adopt a proactive stance as facilitator in resolving it in concert with the Ministry of Environment.

The steps to be taken in doing so are recommended as follows:

1. Establish a process for resolution of the issue.

2. Prepare a letter to inform the Ministry of Environment of the proposed activities of the GOABC on resolving inactive territories.

3. Discuss the proposed approach with the Ministry of Environment and refine it as appropriate with their input.

4. Research the situation for each inactive territory through a consultative process with individual guide outfitters and document:

   - status
   - future intent of the guide outfitter
   - likely viability
   - potential for consolidation
   - possible support mechanisms (e.g. business development) which might be applied to move the inactive territory to an active status

5. Consolidate the results of the consultative process and prepare draft recommendations for the Ministry of Environment.

6. Review the draft recommendations with individual guide outfitters for these inactive territories and refine them as appropriate.

7. Submit the recommendations to the Ministry of Environment for action.

5.0 INDUSTRY-WIDE MARKETING

In the initial review of the scope of this project with the GOABC, priorities were established for marketing initiatives. The GOABC pointed out that their real needs were for a focused, industry-wide marketing approach that served to reduce duplication and clarify the message to the client base. In support of this position, it was noted that the Phase I study clearly indicated that individual guide outfitters demonstrated excellence in marketing skills for the hunting product given their client level of utilization. Although it was recognized that more support still would prove useful at the individual level, the real emphasis should be on the role of the GOABC in industry-wide marketing.

For the non-hunting component of the guide outfitter product, it is premature to prepare a detailed marketing plan or marketing initiatives. Here the effort must be on the fundamentals of the market such as which markets should be targeted, what possibilities there are for marketing approaches, and the like. Guide outfitters as a whole have very limited experience in marketing the non-hunting product. Therefore an emphasis on defining marketing approaches which guide outfitters can explore is preferable.

5.1 Marketing The Hunting Product

In addition to mail-outs from individual guide outfitters, there are several avenues where the prospective hunter can inquire about the B.C. hunting product. These are discussed briefly below.

Ministry of Environment Mail-Out Program

The Ministry of Environment receives about 2,000 requests per year on the British Columbia hunting experience. They have developed a standard package which is mailed to each enquirer and contains:

- a complete list of guide outfitters licensed to provide guiding services to out-of-province visitors
- a synopsis of the hunting regulations
- a hunting licence application
- the GOABC publication - "Western Guidelines"
- the British Columbia Ministry of Tourism Road Map
- a federal government brochure on travel information for foreign visitors.

This information is not designed as a fulfillment package similar to those used by the Minister of Tourism. Rather it is a collection of materials judged to be of interest to the potential hunter. These materials are of varying quality from xerox copies to colour materials.

Ministry of Tourism

The British Columbia Ministry of Tourism operates a toll free line for out-of-province individuals seeking information on British Columbia's tourism products. As part of the toll free service, the inquirer is sent (by mail) a standard package of promotional materials on the Province's tourism products. If the inquirer makes a specific product related request, then the appropriate promotional material is also included (for example, if the request is for adventure travel products, then the Adventure Guide is mailed to the inquirer). Currently there is no provincial lure piece for hunting product and a hunter requesting information may receive the Adventure Guide; it does not have hunting information.

GOABC

The office of the GOABC itself handles a number of mail or phone-in requests from prospective hunters. In addition to answering information requests as much as possible by phone, the GOABC sends the inquirer a standard package including the Western Guidelines publication and the hunting regulations.

Regional Tourism Associations

Marketing information is also distributed through regional tourism associations in the province. At present, three associations provide marketing assistance and support for the guide outfitters who are members. The tourism association has allocated a portion of their marketing budget to the hunting product. The association has developed a specific hunting guide and brochure and answers requested through their toll free line for interested hunters wanting to purchase products for their members. The association also holds forums which provide speakers on various areas of interest to guide outfitters such as the environmental and land use program, development constraints and logging. The North by Northwest Tourism Association also has developed a specific hunting brochure for those members who are guide outfitters. The North by Northwest Hunting Guide was developed through the Sherman Hines publication, and was distributed world-wide through this publication. This association also holds annual general meetings where guide outfitters participate. The third association, the Peace River-Alaska Highway Tourism Association, supports the northern B.C. Guides Association. They provide advertising through the Partners in Tourism program. As guide outfitting is one of their biggest activities, they have a high level of support for those guide outfitters who are members. The remaining tourism associations do not include hunting in their marketing and promotional programs.

Rationalizing Industry-Wide Marketing

As the discussion above points out, there are several different agencies and associations involved in marketing the guide outfitter hunting product, either directly or indirectly through association materials. Each distributes different materials or different combinations of material that they believe will be of interest to the prospective hunter.

One of the most effective strategies which the GOABC can pursue is development of a common and consistent package of information that can be used by all distribution channels. In doing so, one must keep in mind that the prospective hunter is going through specific steps to determine whether or not to take a trip to British Columbia for hunting purposes. Some hunters will engage in comprehensive research about British Columbia's product and utilize multiple sources of information as the basis for their decision. Others are simply seeking information on the hunting product itself and on the possibilities associated with specific species.

In attempting to meet the information needs of potential hunters, the GOABC should consider the development of a standard fulfillment package which has as its cornerstones the provision of information and the promotion of the British Columbia product. Consistency of the message and presentation quality will be important considerations in this regard. The design should carefully consider the specific information requirements of the potential hunter and should convey the impression that the guide outfitter industry "has its act together" in both offering a quality product and maintaining professional practice standards. The professional package should clearly provide information sources for further investigation by the potential hunter.

There is also a real need for a "lure" piece on hunting in British Columbia. This is different in character from the fulfillment package in that it emphasizes promotion (the quality of the experience, the world-class nature of the experience, the range of product available, and information on preparing for the experience). It focuses less on information delivery and is designed rather to encourage the potential hunter to investigate the British Columbia hunting product further.

Key points to be considered in its design include the need:

- to cover hunting, fishing and other wildlife experiences offered by guide outfitting
- to be tasteful
- to limit the number of "kill" shots and to avoid the portrayal of dead animals generally
- to show wildlife in its natural setting
- to demonstrate the rugged wilderness character of British Columbia's wildlife habitat
- to emphasize the conservation-oriented approach taken by industry
- to demonstrate (by selected examples) the resource management actions of the industry.

At present, the GOABC does not have the funds to develop and produce this lure piece. The association has been in discussions with the Ministry of Tourism in Vancouver seeking funds to help develop this lure piece. Another option is to seek corporate sponsorship to help fund the production of the brochure. At the 1990 Spring General Meeting the Board of Directors of the GOABC met with a major hunting magazine to discuss the development of a lure piece. This is one possible option for funding of the material. A key factor which the GOABC should keep in mind when seeking funding support is that the lure piece cannot be designed to meet the needs

of all aspects of the industry. The GOABC should clearly set out objectives that the lure piece is to meet and ensure that the final product meets those objectives. In working with funding partners, the GOABC should ensure that the requirements of the partners or other aspects of the industry do not overshadow the objective of lure piece and, in the end, change the focus of the lure piece.

Fulfillment Package Development

Although the process for development of the lure piece is well in hand, there is currently no activity to develop a fulfillment package. Responsibility for this properly rests with the GOABC in consultation with its membership.

The task of fulfillment package preparation is time consuming and can be costly depending on the use of photographs, the degree of integration of the various individual pieces of information, and the like. The GOABC does not have within its budget the capacity to fund the full cost of fulfillment package development. Therefore it must seek funding support from outside organizations, the most likely of which are:

- the British Columbia Ministry of Tourism
- the British Columbia Ministry of Environment
- corporate sponsors.

Once funding is established and a process for preparing the fulfillment package is underway, the GOABC must give careful consideration to distribution. With only one full-time executive director and part-time support staff, the GOABC cannot assume responsibility for the Ministry of Environment function, nor should it. Hunters seeking information from the Ministry of Environment do so explicitly in some cases to get the public sector perspective on the British Columbia hunting product. Therefore it is appropriate that the Ministry of Environment provide this public service. However, the Ministry together with the GOABC can jointly manage the distribution of information requests and execute this through the present administrative setup in the Ministry of Environment. At the same time, fulfillment packages can be distributed to other distribution channels such as the Ministry of Tourism and regional tourism associations. In the case of regional tourism associations, each guide outfitter regional chapter should make direct contact to explain the purposes and uses of the fulfillment package and to ensure that tourism association management has additional information on the guide outfitter industry.

5.2 Non-Hunting Marketing Initiatives

The Phase I study clearly demonstrated that many guide outfitters were interested in offering non-hunting products but were unsure about either the product development process or how to market these products. It was further demonstrated in that study that hunters are generally not interested in the non-hunting product. Therefore established marketing channels which guide outfitters have developed over the years are not effective or appropriate for the non-hunting product area.

The lack of a broad experience base makes it essential that a new and different strategy be developed to address marketing initiatives in the non-hunting area. The message and approaches with which guide outfitters are fully familiar for hunting must be, for the most part, set aside to avoid wasted effort and resources. In this context, the first step in strategy development is information on how the non-hunting wilderness experience industry operates at present in British Columbia. To do this, detailed interviews were undertaken with a variety of sources in the province who are engaged in wilderness experience tourism products including:

- sector associations
- regional tourism associations
- the British Columbia Ministry of Tourism
- industry partners such as airlines and wholesalers.

The results of that investigation are presented below.

B.C. Fishing Resorts and Outfitters Association

The B.C. Fishing Resorts and Outfitters Association is a relatively new organization formed from the previous Fishing Camps Association of British Columbia. Their province-wide marketing emphasizes both the fishing experience itself and British Columbia's scenic resources as the backdrop against which to enjoy fishing. They now publish an annual freshwater fishing guide in association with the Ministry of Tourism. The guide is funded in part through advertisements taken out by individual members of the association and is distributed by the Ministry of Tourism and as an insert in B.C. Sport Fishing Magazine. The association occasionally places advertisements in fishing related publications but does not do this on a regular basis.

The market which they are trying to access is largely the Lower Mainland of British Columbia, Washington State, and California. These areas comprise 70% of the marketplace for sport fishing lodges and outfitters and enables a reasonably targeted distribution of the freshwater fishing guide.

The association is not organized on a regional basis, opting for a province-wide approach as much easier to manage and provide services to members. Their experience, however, is relatively limited given that this is only their second year of full operation. The association maintains linkages with many provincial government agencies including:

- the Ministry of Tourism (Research Branch)
- Crown Lands
- Finance
- Environment
- Forestry
- Regional offices throughout B.C.

They are increasingly active in marketing the freshwater sport fishing product and have recently completed a comprehensive marketing strategy in collaboration with the Ministry of Tourism. The association also maintains membership in the Wilderness Tourism Council of British Columbia. This membership is important to them, given their concerns with resource management practices and the potential impacts on the resource base which they rely on for their tourism product. The association is beginning to develop an in-house contacts list (on a Commodore computer system) which will facilitate mailings and promotional campaigns.

B.C. Guest Ranch Association

The British Columbia Guest Ranch Association has been in operation for about three years. Their adventure travel marketing efforts focus on the publication of a guest ranch directory under the Partners in Tourism Program. To supplement this directory, the association advertises in Seattle and Portland and relies on trade show attendance to develop clientele for their members. They have also relied, to some extent, on use of the Cariboo Tourist Association Toll Free Line given that many of the guest ranches are centred in this area.

Like the Guide Outfitters Association of B.C., the Guest Ranch Association maintains standards of a practice for its members. The association encourages the offering of high quality product. Membership to the association requires that the operation must consist of buildings to qualify as a guest ranch.

Regional Tourism Associations

The regional tourism associations provide marketing assistance to their members for many non-hunting products such as fishing, trail riding, wildlife viewing, and wilderness resort experiences. They focus on promoting their regions as destinations offering a diversity of tourism products through regional promotional material, attendance at trade shows, and advertisements and magazines and newspapers. One of the difficulties associated with relying strictly on regional tourism associations by sector specific venture travel organizations relates to the lack of focus in promotion and advertising. The regional tourism associations are selling a region along with the many products within that region. Sector associations, on the other hand, are selling a specific wilderness adventure experience. A recent demonstration of the advantages of sector specific marketing is found in the Fishing Resorts and Outfitter's Association success with the Freshwater Fishing Guide. The first year publication of this guide resulted in many new clients for most of the Association's membership, directly attributable to the availability of the guide.

Provincial Marketing Guides

The British Columbia Ministry of Tourism publishes several promotional pieces which are of interest to the GOABC. The most applicable publication to the guide outfitter is "Outdoor and Adventure Vacations". This guide is published in association with the Wilderness Tourism

Council. Three hundred thousand of these are printed annually and distributed through the 1-800 line and other promotions.

There are specific sections on:

- adventure resorts
- nature observation
- sport fishing
- guest ranches and trail riding
- canoeing and kyaking
- cycling
- river rafting
- sailing
- scuba diving
- trekking and mountaineering
- golfing

Success of the Outdoor Adventure Vacation Magazine is evident through the number of tourism operators who pay a fee to advertise in the guide. In the 1990 publication, over 125 operators have paid a nominal fee to advertise. This represents a 25% increase over last year's publication in advertisements. The magazine's first edition, which was published four years ago, was only able to attract 30 operators to advertise. Clearly, there has been a significant increase over those four years. Not only in numbers is the success of the magazine measured. Individual operators realized the benefits from advertising in this magazine and repeat the advertisement the following years. A handful of guide outfitters already advertise in the Outdoor Adventure Vacation Magazine, and discussions with them reveal that they are pleased with the results the magazine has brought to them.

Other promotional publications produced by the Ministry of Tourism include Travel Industry guides for tours and package experiences. These include an Outdoor and Adventure package section aimed at the travel trade, the Partners in the Tourism industry. It provides good value for money, particularly for individual operators. It is well worth while for the GOABC to initiate discussions with the Ministry of Tourism concerning how, under what circumstances, and at what cost they can "try out" these publications on behalf of their industry.

Other Industry Partners

The most significant current program by other industry partners is the Canadian Adventures Program Guide published by Canadian Airlines. This includes information on quality operators which offer a full range of outdoor products including hunting. Canadian Airlines is targeting California in 1990 and Europe in 1991 for this publication. This magazine represents a new trend in marketing the outdoor product and as the success of this program is realized additional partner programs are anticipated.

The Role of the GOABC

The analysis clearly indicates that within the tourism industry, there are already several well-established avenues to market the non-hunting product. For the GOABC to develop a separate brochure highlighting their members' non-hunting product would not be appropriate at this point in time. The most effective role for the GOABC would be in fact to piggyback with these existing programs. The GOABC could approach the Ministry of Tourism to discuss guide outfitter representation in the Outdoor and Adventure Vacation Guide. All other components of the Outdoor Adventure/Recreation sector are represented, but the guide outfitters are not within this guide. It may be appropriate to develop a page which highlights the outdoor activities offered by British Columbia guide outfitters. This page could be included as a component of the Guest Ranches and Trail Riding section within the document. To determine the support of the industry to establishing this guide, the GOABC should survey its membership to determine the level of interest in advertising into the Outdoor and Adventure Vacation Guide. If, for example, the GOABC was able to attract a minimum of 12 guide outfitters to advertise in this magazine, this would represent two pages of advertisement and would possibly help offset the cost of the additional page of text for the Guide Outfitters Association.

Over the long term, it may be appropriate for the GOABC to develop a lure piece or a brochure which highlights the guide outfitters' non-hunting product. This piece could be included in the hunting lure piece which was discussed in the previous section. However, the costs for the development of this lure piece would be substantial, and as the industry is in its infancy stages in developing the non-hunting product, it would be inappropriate for the GOABC to develop this brochure.

The GOABC could also provide support to the individual guide outfitter in their efforts to market the non-hunting product by distributing a fact sheet on some general trends and options for marketing to the non-hunting clientele. This fact sheet has been developed as part of the Phase II study, and is provided in Annex A. This fact sheet could be updated over the years, and distributed to all members, possibly on an annual basis. The cost of advertising in magazines such as the Outdoor and Adventure Vacation Guide could be updated as they increase. New marketing avenues could also be added to this fact sheet as they occur over time.

Product development workshops are proposed in Section 6.0 of this report. These workshops could also include material on marketing to the non-hunting clientele. The workshop agenda will cover preparation of a product and market analysis by the guide outfitters and, for those interested in developing non-hunting product, a marketing strategy for the non-hunting product. Thus these workshops will serve as an extension of the first series of workshops, providing more in-depth information on marketing to the non-hunting clientele.

6.0 PRODUCT DEVELOPMENT

The Phase 1 Guide Outfitters Study recommended a series of initiatives to improve the viability of the guide outfitter's businesses. These initiatives identify areas for enhancing the existing hunting product and encouraging diversification into non-hunting product. In this section a strategy to assist guide outfitters with product development is presented, using the Phase I initiatives as a starting point. The emphasis of the strategy has been to build on the existing government programs and projects administered by the Ministries of Tourism and Environment (Wildlife Branch).

The first step in developing the strategy was to assess the current programs and projects as to their application to guide outfitters product development. Many have direct application to guide outfitters, others have only indirect application.

6.1 Existing Government Programs and Projects

Guide Outfitters of British Columbia: Opportunity Analysis

This report, commissioned by the Ministry of Tourism, constitutes a very important step in product development for guide outfitters. It provides the guide outfitter with a first time assessment of the industry's products, markets and economics. The Phase 1 report provides the guide outfitter with the necessary data to assess the viability of their business. Provincial and regional averages are available for all aspects of the business for the guide outfitter to use as a comparison for their own business. Information on what makes a guide outfitting business successful is also available. As such it serves as a reference document for guide outfitters to set goals and objectives for product development, refine operational practises, consider new markets and establish pricing.

Guide Outfitters Marketing and Product Development Workshop

Funded through the Guiding Initiatives Program the objective of these workshops was to provide guide outfitters with product development and marketing tools. The program was administered through a Steering Committee comprised of representatives from:

- Ministry of Environment, Wildlife Branch
- Ministry of Tourism, Development Branch
- GOABC.

As the Phase 1 report was written for multiple audiences the Guiding Initiative Program played a vital role in presenting the results of the Phase 1 report to guide outfitters in a small group workshop setting. The first part of the workshops focused on the findings of the Phase 1 report. Emphasis was placed on showing the guide outfitter how to use the data as a comparison in assessing their own business. Detailed discussions took place with respect to the positive and negative aspects of guide outfitter businesses. The second half of the workshop presented details

on a series of marketing tools. Feedback from participants indicated that workshops were successful in providing the guide outfitter with useful tools to assess and enhance their current business situation. A total of 5 workshops were held over the past two years.

Guide Area Development Plans

This program, also administered by the Guiding Initiatives Program, provides assistance to guide outfitters to undertake long-term planning for the management of their territories. The guide area development plans are designed to:

- assist in the resolution of resource use conflicts
- optimize and expand business opportunities
- establish sound wildlife and resource management practices
- provide comprehensive wildlife and hunting information
- assist in possible compensation claims.

The program provides funds for a consultant to assist individual guide outfitters in preparing their guide area development plan. It also provides for wildlife biology consulting services to address wildlife enhancement initiatives appropriate for the guide outfitter territory.

The focus of the guide area development plan is on the management of the habitat and wildlife components of the guide outfitting business. It is not a business plan. In preparing the plan the guide outfitter assesses their current situation and sets goals for the future with respect to the management of their territory. As illustrated in Exhibit 6.1 the development plans do not focus on the assessment of business components such as product or market analyses.

EXHIBIT 6.1

OUTLINE OF GUIDE AREA DEVELOPMENT PLAN

1. *INTRODUCTION - objectives, purpose of plan, information sources.*

2. *DESCRIPTION OF AREA - location, access, land tenure, biophysical summary.*

3. *GUIDE OPERATION - licensing, seasons of use, other business activities, facilities, equipment, clients, user days, sales, marketing, pricing, business goals.*

4. *WILDLIFE RESOURCES - species, populations, habitats, fish resources, important non-game animals.*

5. *WILDERNESS AND RECREATION RESOURCES - non-consumptive wilderness and recreation opportunities such as nature appreciation, canoeing, camping, wilderness tourism, winter sports, viewing.*

6. *OTHER RESOURCE ACTIVITIES - access development, forestry, mining, etc.*

7. *PRESENT WILDLIFE MANAGEMENT - enhancement programs, regulations.*

8. *GUIDE AREA DEVELOPMENT PLAN - business and management goals, options for habitat enhancement, transplants, developing non-hunting activities, access control, research and information requirements, marketing strategy.*

9. *CONCLUSION - identify major concerns, resource conflicts, and problems; summarize benefits of plan.*

10. *APPENDICES - maps, schedules, business plan, references, contacts.*

Guide Outfitter Wildlife Enhancement Fund

The wildlife enhancement fund provides a cost-sharing mechanism for guide outfitters to participate in wildlife enhancement within their guiding territory. The fund is a component of the Guiding Initiative Program and the GOABC is responsible for the development, implementation and administration of all enhancement projects.

Although the type of projects available for approval is flexible, wildlife enhancement must be the main focus of the project. The guide outfitter must contribute a minimum of 25% of the costs of the project. This can be either in funds or in labour, materials or equipment. The proposal is made to the regional association and reviewed by the Regional Wildlife Biologist. The GOABC is responsible for final approval of the proposal.

This fund has been in place since 1988 and several projects have been completed or are in process. Although information on the fund has been distributed to guide outfitters individually and information provided at the general meetings, it is not clear if the industry as a whole is aware of the program. Neither is it clear that the industry as a whole is aware of what has been completed under the program. Thus there is a need to inform the industry and other agencies, organizations as to the success of this fund (see Section 3: Industry Awareness).

Ministry of Tourism Product Development Manuals

The Ministry of Tourism has recently commissioned the preparation of two product development manuals. The first one, British Columbia Tourism Development Handbook, is a generic product development handbook for the tourism industry. The handbook is targeted to those individuals interested in starting up a new tourism business. It is designed as a step-wise handbook which encourages the reader to ask the right questions in evaluating the feasibility of a new tourism business. As the handbook is targeted to a wide audience the material is not specific enough to be applicable to the guide outfitting business, other than on a general business planning basis.

The second handbook is more applicable to the guide outfitting industry. This document, A Marketing and Product Development Manual for the Freshwater Fishing Resorts of British Columbia, was commissioned by the Ministry of Tourism. It is a step wise manual which walks the reader through an analysis of the product and market components of their business. Although several of the tables and exhibits are specific to the freshwater fishing resorts industry the manual could readily be used by a guide outfitter in setting goals and objectives for their business and in the preparation of a business plan.

Ministry of Tourism Product Development Branch

In the past the Ministry of Tourism has run funding and education programs to assist tourism operators with product development. The Canada-British Columbia Tourist Industry Development Subsidiary Agreement provided a variety of programs for tourism development within the province. This program was completed in March 1990.

The Ministry has also sponsored business development workshops which were held in various regions throughout the province. These workshops focused on the development of business plans for tourism businesses and were available to guide outfitters.

6.2 Assessment of Existing Programs

Each of the programs and projects described above provide the guide outfitter with assistance in one or more components of the product development process. The Phase 1 report, combined with the product development and marketing workshops, provided good baseline data and tools for developing a product and market strategy. The Guide Area Development Plan, which can be funded under the Ministry of Environment Guiding Initiative program, provides the guide outfitter with a tool to establish a management plan for their wilderness resources. Funding support to implement enhancement projects identified in the guide area development plan can be obtained through the Guide Outfitter Wildlife Enhancement Fund. Although not specific to the guide outfitting, business planning manuals are also available to assist the owner in product and market analysis.

These programs have tended to run in parallel and have not been integrated at the guide outfitter level in the form of a comprehensive business planning approach. The comments from those individuals who attended the guiding workshops underscores the need for an integrated approach. They expressed interest in more information on how to improve the quality of their existing hunting product and diversify into non-hunting products. Although the workshops did touch on these topics, the guide outfitters identified more hands-on assistance in actually setting product and market goals and preparing business plans as important. They see business plans as a complement to the guide area development plans and as a useful tool to help them manage their business and seek funding for product and market expansion.

6.3 Strategy For Future Programs for Product Development

There are three key factors to consider in determining future programs for the industry;

- there will be limited funding for future programs with the completion of the Tourism Agreement
- the existing programs have produced excellent results and are well received. Building on these results through new programs will provide continuity for guide outfitters
- there is a need for hands-on assistance to guide outfitters who are interested in expanding or diversifying their business.

Based on these factors it is recommended that the Guiding Initiatives Program sponsor a second series of workshops which are a natural progression from the first set. This new series of workshops will provide those guide outfitter who want to expand or diversify with the tools and

assistance to prepare a business plan. The business plan can then be used as a tool to assist in seeking funding through financial institutions and act as a "blue print" for expansion. As a result, the business plan in combination with the guide area development plan will contribute significantly to the guide outfitters capacity to successfully manage their business.

Draft workshop materials to apply to guide outfitting businesses are provided in Annex C. The content of the workshops should focus on:

- upgrading or improving the guide outfitting product
- diversifying the product to meet the needs and expectations of existing or new markets
- developing new non-hunting product packages.

These workshops should be held throughout the various regions within the province and made available to all guide outfitters. Each workshop should be evaluated and the Guiding Initiative Committee should monitor the success of the first few workshops to determine if they should be continued or redesigned.

7.0 MANAGEMENT PLAN

To achieve the programs described in the previous sections of this report, a management plan for the GOABC is presented in this section. The characteristics of this plan are:

- a requirement for formal delegation of responsibilities by the Board of Directors in specific areas
- strengthening of the linkages with regional guide outfitter associations
- provisions for flexibility in the allocation of resources (both time and out-of-pocket expenses) so that undue strain is not placed on the GOABC's capacity to implement the programs
- incremental costs which, for the most part, are not onerous in the context of the GOABC's budget.

The management plan described below is designed to implement the four programs recommended for the GOABC as summarized in Exhibit 7.1.

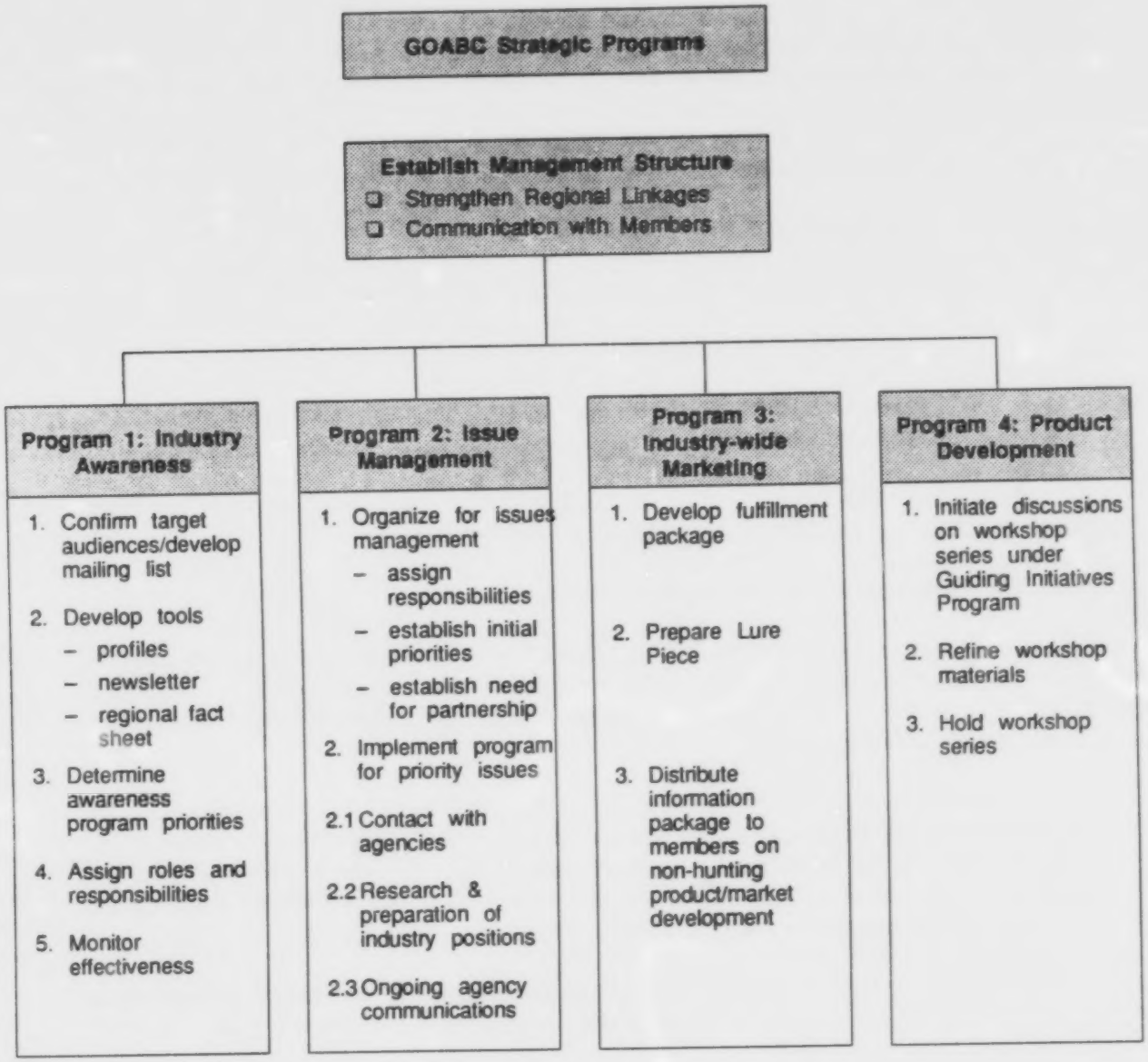
7.1 Recommended Management Structure

The current organizational structure of the GOABC is not entirely appropriate for effective implementation of the four programs. In order to achieve the intended results, some changes are required, given the current significant workload of the association and demands placed on the Board and Executive Director.

The recommended changes are not fundamental. Rather, they merely involve refinements in the manner in which the Board conducts its business to ensure that a proper focus is placed on the proposed programs and to spread the workload amongst Board members rather than placing it mostly on the Executive. The principles which have been used to guide the recommendations for changes in the management structure are:

- that the GOABC Board of Directors must clearly lead and be involved in the implementation of the programs described in this report
- that a sub-committee structure should be established comprising Board members and possibly others drawn at large from the membership, with clear reporting responsibilities to the Board of Directors
- that the sub-committee structure should be serviced by the Executive Director of the Association

Exhibit 7.1: Overview of Program Elements


GOABC Strategic Programs
Establish Management Structure
Strengthen Regional Linkages
Communication with Members
Program 1: Industry Awareness
1. Confirm target audiences/develop mailing list
2. Develop tools
– profiles
– newsletter
– regional fact sheet
3. Determine awareness program priorities
4. Assign roles and responsibilities
5. Monitor effectiveness
Program 2: Issue Management
1. Organize for issues management
– assign responsibilities
– establish initial priorities
– establish need for partnership
2. Implement program for priority issues
2.1 Contact with agencies
2.2 Research & preparation of industry positions
2.3 Ongoing agency communications
Program 3: Industry-wide Marketing
1. Develop fulfillment package
2. Prepare Lure Piece
3. Distribute information package to members on non-hunting product/market development
Program 4: Product Development
1. Initiate discussions on workshop series under Guiding Initiatives Program
2. Refine workshop materials
3. Hold workshop series

- that the linkages between the GOABC and regional guide outfitter associations be strengthened to the maximum extent possible

- that communications with the membership at large be strengthened and, more specifically, that a specific co-ordination function for this communication be established

- that the implementation process for this strategic plan be co-ordinated with the Guiding Initiatives Program.

Based on these principles, recommended management structure changes are described below.

Sub-Committee Structure

There are three major task areas required for the implementation of the programs shown in Exhibit 7.1:

- Program 1: Industry Awareness

- Program 2: Issues Management (fulfillment package and lure piece development)

- Program 3: Industry-Wide Marketing

Each task area is significant enough to require delegation of responsibility to a sub-committee of the Board for day-to-day implementation. Program 4: Product Development does not, in our view, require a sub-committee approach given that implementation can follow immediately after approval of the proposed workshop series under the Guiding Initiatives program.

Sub-Committee on Industry Awareness Program. The role of this sub-committee is to assume responsibility for implementation of the awareness program described in Section 3 of this report. The sub-committee should become a permanent organizational element in the association given that industry awareness is an ongoing task. The steps involved in "launching" the awareness program are set out in more detail in Section 7.2. One of the first tasks of the sub-committee will be to review the recommended industry awareness program, suggesting any refinements or modifications, and establish priorities for implementation. These priorities should cover not only the tools to be developed, but also the priority target audiences.

We recommend a sub-committee comprising 4-7 persons with at least four members drawn from the Board of Directors. The suggested reporting relationship is as follows:

- preparation of an awareness program "launch"

- recommendations including activities for the subsequent year (submitted to the Board of Directors for approval)
- preparation of annual reports (submitted to the Board of Directors for approval)
- preparation of progress reports three times a year (submitted to the Board of Directors for information)
- presentation of results of the preceding year and proposals for the next year (presented to an annual general meeting after approval by the Board of Directors).

The Executive Director should provide a co-ordination function to ensure that the overlaps which exist between this sub-committee and the Issues Management Sub-Committee are managed effectively.

Sub-Committee on Issues Management Program. Like the Sub-Committee on Industry Awareness, this sub-committee should become a permanent fixture of the association responsible for initial implementation of the issues management program and its ongoing management. The general recommendations regarding the Sub-Committee on Industry Awareness described above also apply to this sub-committee. Some additional areas of emphasis, however, should be noted. Firstly, it is critically important that this sub-committee establish regular and ongoing communication with regional associations. It is at the regional level that many issues, particularly in the resource management and habitat enhancement areas, arise. Therefore, it may be appropriate for the Board of Directors to consider that this sub-committee be comprised primarily of presidents of the regional associations. At the same time, maintenance of a province-wide perspective is also important; for example, in dealing with issues such as the GST. Therefore, it is also appropriate to ensure that a representative from the Executive Committee (eg. the President or Vice-President) serves as Chairperson for this committee.

In addition to its normal duties relating to issues management, it is important that this sub-committee regularly convey information on its activities to the membership at large and to selected target audiences. This function is probably best fulfilled through the newsletter tool recommended under the Awareness Program. Therefore, a logical function of this sub-committee then is to provide newsletter material to the Awareness Program Sub-Committee for inclusion in the newsletter.

Sub-Committee on Fulfillment Package and Lure Piece Development. Unlike the two sub-committees described above, this sub-committee need only have a limited life, defined by approval of the recommended fulfillment package and lure piece by the GOABC Board of Directors. The mandate of this sub-committee is to develop recommended options for these marketing tools for consideration by the Board. Work on the fulfillment package will require co-ordination and consultation with those agencies currently providing information to the general

public and to client groups (see Section 5.0 of this report). The recommended approach involves three general steps as follows:

1. The GOABC Board of Directors establishes terms of reference and budget limits for both the fulfillment package and lure piece.

2. The sub-committee undertakes necessary consultations and retains specialists' advice as appropriate to develop options for consideration by the Board.

3. The Board approves a preferred option for marketing tools and authorizes appropriate expenditures for their preparation and printing.

During the course of the sub-committee deliberations, attention must be given to the role of the current GOABC Western Guidelines Publication, the recommended approach to delivery of the fulfillment package and lure pieces, target markets, and monitoring of effectiveness.

Strengthen Regional Linkages

There is an identified need to establish better communications between the GOABC and counterpart regional associations of guide outfitters. The maintenance of an effective provincial organization in a province as large as British Columbia is always a challenge. In the case of guide outfitters, many of the issues arise first at the regional level and the regional associations assume leadership for their resolution. The provincial association provides support as best it can within the limited resources it has to offer. In some cases, the provincial association has simply not been able to respond as effectively as desired because of previous commitments of resources to province-wide concerns. For example, guide outfitters in the Kootenay region have decided to retain an Executive Director at the regional level to assist in properly managing the magnitude and scope of activities and issues with which it is faced.

To be sure, the provincial association cannot realistically hope to always provide an ideal level of service in a timely fashion to the regions in all instances. Based on the recognition that a province-wide association is essential to the industry's success, the best that one can hope for is a province-wide organization that:

- represents the industry effectively on industry-wide concerns
- provides support in the form of co-ordination services and tools which complement the activities of the regional association
- strengthens the linkages with regional associations.

The programs described in this report are aimed at enhancing the GOABC's effectiveness for the first two points listed above. A strategy to strengthen linkages is, however, more of a management issue. One option for this is to consider amendments to the method for selecting

the GOABC Board of Directors; specifically to provide for the presidents of regional associations to be automatically assigned a seat on the Board with remaining members elected at large. There are of course other options for refinements to this option which the Board of Directors can consider. In any case, it is important that the Board revisit its current management structure to improve its relationships with regional associations for the benefit of all guide outfitters.

Communication With the Membership

Communication with GOABC membership has long been a priority with the Board of Directors. It is fundamental to the continued effectiveness of the association and is perhaps the single most important function which any association can undertake. The current methods of communication (occasional mail-outs to members on specific items, the Western Guidelines publication, and annual general meetings) are rapidly being rendered obsolete by the sheer magnitude of the activities and issues which the GOABC and regional associations face. It is partly for this reason that a regular newsletter approach is recommended in the awareness program. Applicable to guide outfitter target audiences, it is also equally applicable to the association membership.

In the case of the membership, the association should consider an approach to the newsletter distribution as follows:

- the preparation of a basic newsletter distributed to target audiences (as per the awareness program)

- the inclusion of an insert communicating GOABC internal matters and distributed along with the newsletter to members.

In this way, in addition to the normal communication channels, all members are assured of an update on GOABC activities at least three times per year.

Coordination with the Guiding Initiatives Program

The GOABC should review the contents of the Guiding Initiatives Program workshop series and advise committee members on areas where adjustments can be made to reflect the association's strategic plan. In particular, areas in which members have expressed interest for future workshops are:

- product diversification into non-hunting areas
- marketing plan development
- the preparation of comprehensive business plans.

The Guiding Initiatives Program is an important support tool for the industry. Through co-ordination with the association's strategic plan objectives, it can facilitate industry growth.

7.2 Workplan and Budget Requirements

Workplans for each of the proposed programs are summarized in Exhibits 7.2 to 7.5. Where appropriate, these set out the responsibilities of the GOABC Board of Directors and recommended subcommittees as one proceeds through step by step implementation of the workplans.

Incremental budget requirements to implement the four programs described in this report are summarized in Exhibit 7.6. These represent "out-of-pocket" items and, as such, do not account for the time required from board members and others from the GOABC.

Estimated costs are shown for the first year as well as for annual costs thereafter. First year activities include start-up costs which are not incurred in subsequent years.

In addition to cost estimates for each program, the budget includes additional costs expected to be incurred by the GOABC in the form of additional office support requirements. Here, it is proposed to upgrade office capability for report production and information mail-outs. Additional mailing and secretarial costs will also be incurred.

Sources of funding for first year implementation of the plan could include:

- the GOABC
- the Ministry of Tourism Marketing Branch (for fulfillment package/lure piece development and distribution)
- the Guiding Initiatives Program (for the workshop series and supporting materials related to assisting members with business planning efforts).

The Marketing Branch of the Ministry of Tourism will, upon request and subject to resource availability and priorities, provide sector specific marketing assistance. This is an important avenue for the GOABC to pursue given the need for implementation of a fulfillment package/lure piece marketing approach.

The Guiding Initiatives Program has historically emphasized hunting product, resource management and, more recently, marketing. The logical next step, and current need, is to integrate these efforts into an overall business planning approach which also addresses non-hunting product potential.

Some of the key budget assumptions are:

- **Program 1: Industry Awareness**

  - 5,000 copies of each profile sheet (assumes distribution to about 1,000 target audiences with the remainder distributed to GOABC members for their use).

  - About 1,000 newsletter copies per issue is assumed for distribution to both members and external audiences

  - The media workshop assumes retaining a facilitator plus travel expenses

- **Program 2: Issues Management**

  - Assumes an average cost of $5,000 per major issues paper (this could vary significantly depending on the nature of the issue and the extent of research required)

- **Program 3: Industry Wide Marketing**

  - Assumes that the inserts for the fulfillment package will be provided by Ministry of Tourism and Environment, plus the lure piece. The costs incurred will be to design and print a folder for inserts.

- **GOABC Office Support**

  - Assumes a 286 micro computer, word processing and mailing list software, and a laser printer

  - Annual costs after the first year related to the computer system include maintenance contracts and supplies.

The first year budget is estimated to be $72,200. A budget of $39,900 is estimated on an annual basis thereafter. The major savings after the first year are incurred in the industry awareness and industry-wide marketing programs. In these cases, budget reductions are based on the fact that the cost of designing and producing some of the material (e.g. the lower piece and fulfillment package) are incurred only in the first year. There will be additional costs incurred after start-up for updating but these are significantly less than first year budget requirements.

EXHIBIT 7.2: WORKPLAN: PROGRAM 1 - INDUSTRY AWARENESS

Responsibility	Program Launch Steps	
GOABC Board mandate	1.	Establish Industry Awareness Sub-committee and crfm
Subcommittee/ Executive Director	2.	Review draft program and prepare recommendations for Board on: • target audiences priorities • 1st draft of newsletter • process for preparing regional fact sheet • newsletter publication/management • newsletter for "launch" of program and 1st year activities
Subcommittee/ Executive Director	3.	Upon approval from Board: • finalize & print profiles & newsletters • develop mailing list • assemble presentation packages for 1st year in-person presentations • assign responsibilities for presentations
Selected GOABC Members for Presentations	4.	Launch Awareness Program • mailouts • presentations
Sub-committee & Regional Association Reps.	5.	Prepare Regional Fact Sheets
Executive Director	6.	Establish Feedback/Monitoring Mechanism
	Ongoing Activities	
Sub-committee/ Executive Director	•	Annual report to Board & presentation to members
	•	Progress reports (3 times per year)
	•	Newsletter (3 times per year)
Executive Director	•	Updates of profiles/fact sheets

EXHIBIT 7.3: WORK PLAN: PROGRAM 2 - ISSUES MANAGEMENT

Responsibilities	Program Launch Steps
GOABC Board	1. Establish sub-committee for issues management and confirm mandate
Sub-committee/Executive Director	2. Review draft issues management process and prepare recommendations to Board on: • comprehensive list of issues to address • priority issues for coming year • responsibility for tracking priority issues • partnerships by issue (if any) • specialist expertise & budget (if necessary) • process for coordinating with Regional Associations
	3. Upon approval by Board, implement coming year priorities
	Ongoing Activities
Subcommittee/ Executive Director	• Update articles for newsletter (see awareness program) • Annual report to Board and presentation to members

EXHIBIT 7.4: WORKPLAN: PROGRAM 3 - INDUSTRY-WIDE MARKETING

Responsibility	Program Steps	
	Lure Piece & Fulfilment Package	
GOABC Board	1.	Establish sub-committee to develop options for fulfilment package and lure piece
Sub-committee/ Executive Director	2.	Consult with appropriate agencies (see Section 5.0) to identify roles and responsibilities
	3.	Consult with Ministry of Tourism on fulfilment package and lure piece design and content. Review examples from other sectors.
	4.	Assess mandate and distribution channels and specify content/design guidelines.
	5.	Prepare content recommendations, mock-up designs and review with Ministry of Tourism. Contract graphics/design specialist if necessary.
	6.	Investigate funding options with Ministries of Tourism and Environment.
	7.	Prepare option for Board consideration including distribution channels, cost estimates and sub-committee recommendations.
GOABC Board	8.	Approve final design/content and authorize expenditures

Exhibit 7.5: WORK PROGRAM: PROGRAM 4 - PRODUCT DEVELOPMENT

Responsibility		Program Steps
GOABC Board	1.	Review/refine draft material for workshops
GOABC Board	2.	Present workshop seris initiatives to Guiding Initiative Program Steering Committee.
Guiding Initiatives Program	3.	Establish coverage, budgets, locations, and prepare terms of reference.
	4.	Contract workshop facilitator.
	5.	Evaluate workshop programs.

Exhibit 7.6: Incremental Budget Requirements (Out of Pocket)

Program Requirements	Incremental Expense Item	1st Year Estimated Cost	Estimated Annual Cost after 1st Year
Program 1: Industry Awareness			
Profiles	Preparation / printing (5 profiles at 5,000 copies each)	$4,000	$2,000
Newsletter	Preparation / printing (3 issues per year @ $2,000 / issue)	$6,000	$6,000
Regional Fact Sheets	Preparation / printing (8 fact sheets @ $900 / sheet)	$7,200	$1,200
Media Workshop	1 full-day workshop	$1,500	-
	Subtotal	**$18,700**	**$9,200**
Program 2: Issues Management			
Ongoing Issues Management	Travel, printing	$5,000	$5,000
Major Issue Papers (if required)	Specialist expertise and submission preparation (assume 2 issue papers at $5,000 each)	$10,000	$10,000
	Subtotal	**$15,000**	**$15,000**
Program 3: Industry-wide Marketing			
Fullfillment package		$5,000	-
Lure Piece	Design / Production (assumes cost-sharing of 50% by government or corporate partner)	$10,000	-
Inclusion of Non-hunting information in Provincial Publications		$1,000	-
	Subtotal	**$16,000**	**-**
Program 4: Product Development			
Guiding Initiatives Program - New Workshop Series	No incremental cost	-	-
	Subtotal	**-**	**-**
GOABC Office Support			
Upgraded Word Processing / Mailing List Development	Computer system / software / training	$8,000	$1,200
Mailing Costs	Newsletter / profiles	$2,500	$2,500
Increased Office Support	Half-time secretarial / supplies	$12,000	$12,000
	Subtotal	**$22,500**	**$15,700**
INCREMENTAL BUDGET REQUIREMENTS		**$72,200**	**$39,900**

ANNEX A

FACT SHEET

MARKETING THE NON-HUNTING PRODUCT

Marketing to the Non-Hunting Clientele

The focus of this fact sheet is to provide guide outfitters with information on the types of marketing avenues available to them to capture non-hunting clientele. However, before choosing any of the options discussed below, it is important that a marketing plan be developed. A marketing plan is a blueprint for targeting specific market segments. The plan ensures that efforts are co-ordinated, consistent and aimed properly to target markets. It also ensures marketing budgets are spent wisely. A marketing plan addresses four key questions:

- Where are you now?
- Where would you like to be?
- How will you get there?
- How will you know when you have arrived?

Where am I now?

In answering this question, a guide outfitter will conduct an in depth look at the following:

- Your product (facilities, services and nature of the experience)
- Your market (existing and prospective)
- Your competition
- The business environment.

The end result of answering this question is not only a description of the specific aspects of the guide outfitter business but a true identification of market opportunities by segments placed in order of priority.

Where would I like to be?

In this task, one asks important questions in setting objectives. The objectives should be:

- Specific
- Stated in terms of desired results
- Expressed in quantitative terms so that actual results can be measured
- Achievable within a specific period of time.

How will I get there?

At this stage you determine how you will meet the specific marketing objectives that you have set. You will identify which marketing avenues are best and most appropriate in achieving your objectives. This fact sheet discusses some of the many avenues that are available to you in reaching your marketing objectives.

How will you know when you have arrived?

In this step the results of your marketing efforts will be measured against your objectives. Ideally, you should realize an increase in sales if you are using a well balanced mix of marketing means to reach your specific target. This evaluation if conducted on a yearly basis will allow you to determine the effectiveness of the plan and to refine the plan where required.

As stated previously, this fact sheet is designed to provide guide outfitters with marketing tools in targeting the non-hunting market. The previous discussion on establishing a marketing plan is an important first step for all guide outfitters to compete if they are choosing to offer non-hunting products. Through the Guiding Initiatives Program, workshops are being developed to help guide outfitters prepare product and market analysis and subsequent marketing plans and business plans. Contact the GOABC or your regional association to find out further about these workshops.

MARKETING TOOLS

Non-hunting clientele differ from hunting clientele in origin and use of marketing tools.

Exhibit 1 illustrates the market origin of a variety of outdoor products. The non-hunting product attracts the close-in markets, ie. British Columbia, Alberta and Washington. The long-haul markets such as other provinces in Canada, eastern U.S., mid-US states and overseas markets represent a smaller market share.

EXHIBIT 1: OUTDOOR/ADVENTURE MARKETS

	B.C. %	Alta %	Other Canadian %	Wash. & Oregon %	Calif. %	U.S. %	Overseas %
Backpacking	64	4	11	3	5	3	9
Hiking	30	19	20	8	18	29	32
Nature Tours/Land	17	7	7	16	16	13	24
Nature Tours/Water	29	7	12	15	13	9	15
Canoeing	42	3	12	6	10	5	13
Kayaking	52	8	10	7	8	11	4
Cross Country Skiing	61	21	4	6	1	1	6
Ski Touring	63	12	11	8	2	2	2
Trail Riding	53	5	6	5	7	9	14

Source: Adventure Travel in B.C., Outdoor Recreation Analysis

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The types of marketing tools that are used to target these markets vary slightly from those that are used to attract hunting clientele. Based on surveys from British Columbia Outdoor/Adventure operators, the most popular type of vehicles used are brochures, magazines, direct mail and promotional trips (Exhibit 2). The following is a discussion on the key marketing tools available to guide outfitters. Potential sources and costs are included.

EXHIBIT 2: USE OF PROMOTIONAL VEHICLES BUDGET BY BRITISH COLUMBIA ADVENTURE OPERATORS

	% Using the Vehicle
Brochures	93
Posters	34
Magazines	66
Radio Ads	19
Newspapers	40
Television	4
Promo Trips	53
Accommodation Guide	29
Travel Trade Shows	37
Consumer Shows	39
Film/Slide Shows	35
Word of Mouth	87
Familiarization Trips	31
Direct Mail	63
Other	18

Source: Adventure Travel in British Columbia, Outdoor Recreation Council

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BROCHURES

In marketing to the non-hunting clientele, guide outfitters will need to develop a separate brochure which highlights the non-hunting activities that they offer. The brochure should be a mixture of text and pictures, and the pictures should have people participating in the activities offered. An effective brochure should include the following:

- Descriptive map showing location of facility with respect to North America;
- Booking information, cancellation and refund policy;
- Pricing (identify currency) - this can be an insert or flat sheet which can be changed each year;
- Validity date; and
- A call to action - a telephone number, FAX and address.

Similarly to the hunting product, a successful business is based on a mailing list comprised of past clients and potential prospects. An important component for any marketing plan would be to ensure time is spent in developing an effective mailing list.

BRITISH COLUMBIA'S OUTDOOR AND ADVENTURE VACATION MAGAZINE

The Ministry of Tourism publishes a very popular magazine which targets the outdoor markets. The guide, Outdoor and Adventure Vacations, provides text and product offerings on a variety of outdoor activities. Those activities applicable to guide outfitters include nature observation, sport fishing, and trail riding. In 1990, over 125 operators paid a fee to advertise in this magazine. The current distribution of the magazine is well over 300,000 copies annually. The magazine is distributed through the province's 1-800 line, the regional associations and at other Ministry events.

The cost of advertising in this magazine is very reasonable when considering its distribution and effectiveness. The rates for advertisement range from $825.00 for a small directory size, $2850.00 for a third of a page, $4650.00 for a half page, and $4800 for two-thirds of a page. If guide outfitters are a member of a regional tourism association, advertisement in this magazine can be financed by approximately 50% through the Partners in Tourism program. In addition, those people who advertise in this magazine receive a printout of individuals requesting further information on their product. Operators who have advertised in this magazine feel that their bookings have increased and continue to advertise in the magazine year in and year out.

SPECIALTY CONSUMER MAGAZINES

Advertising in selective and specialty consumer magazines can be costly. However, many operators find that with consistent and frequent efforts the cost is effective and new markets are reached through these magazines. Operators using these magazines feel that they are very effective as they attract a devoted readership group interested in specific outdoor activities. The distinct advantages to advertising in these magazines is that they attract a select readership and they have a long lifespan. These magazines tend to stay around in the office or home and are often passed on to other individuals. A result the advertisement is more likely to be seen and studied. The following is a listing of key specialty magazines which are popular for advertising outdoor products.

LIST OF SPECIALTY MAGAZINES

Backpacker Magazine
33 E. Minor Street
Emmaus, PA 18098
(215) 965-5171
Contact: Heidi Brough
176,631 Paid Circulation
7 Annual Issues
Backpacking, Hiking, Mountaineering, Canoeing, Cross Country Skiing
Male 76.3%
Median Age 33.6
Household Income $60,000+ 23.5%
Classified Ad Section
North America
Backpacker covers the broad range of interests that comprise the wilderness adventure

Audubon
950 Third Avenue
New York, NY 10022
(212) 546-9123
Contact: John Gourlay
433,421 Paid Circulation
6 Annual Issues
Nature Observation, Environment, Photography
Female 50%
Median Age 49
Median Income $37,530
Classified Ad Section
United States 95%, Canadian and Foreign 5%
Audubon magazine covers subjects ranging from environment and wildlife stories to science, politics, law and sport

Outside
1165 N. Clark Street
Chicago, IL 60610
(312) 951-0990
Contact: Rob Ettenson
287,373 Paid Circulation
12 Annual Issues
Backpacking, Hiking, Nature Observation, Cross

Explore
301 - 14th Street N.W.
Calgary, Alberta T2N 2A1
(403) 270-8890
Contact: Peter Thompson, Publisher
31,000 Circulation
4 Annual Issues
Kayaking, Canoeing, Backpacking, Cycling, Camping, Cross Country Skiing, Photography
Male 72%
25-40 Years of Age 69.9%
Household Income $50,000+ 35.7%
Classified Ad Section
Canada 95%
Canadian publication focusing on outdoor adventure for any season. In fact each publication is geared towards a specific season and its outdoor activities.

Equinox
50 Holly Street
Toronto, Ontario M4S 3B3
(416) 482-9399
161,392 Paid Circulation
6 Annual Issues
Nature Observation, Environment, Photography
Males 57%
25-49 Years of Age 53%
Household income $50,000+ 51%
Classified Ad Section
Canada 96%, United States 2%, Foreign 2%
Consumer magazine exploring the natural wonders, peoples, science, art, architecture, history and wildlife of Canada and the world. There is also an Ontario edition.

Sierra
730 Polk Street
San Francisco, CA 94109
(415) 923-5650
Contact: Jackie Briggs
379,900 Circulation
6 Annual Issues
Nature Observation, Environment,

Country Skiing, Bicycling, Kayaking, Canoeing
Male 77%
Median Age 34
Median Household Income $52,000
Classified Ad Section
United States 95%, Canada and Foreign 5%
Editorial combined with photography enlightening readers on outdoor adventure activities throughout North America, as well as international destinations.

Photography
Female 52%
Median Age 43.9
Median Household Income $49,400
Classified Ad Section
United States 96%, Canada and Foreign 4%
Sierra contains photography and editorial which combine to inform readers about environmental issues.

Canadian Geographic
39 McArthur Avenue
Vanier, Ontario K1L 8L7
(613) 745-4629
Contact: William March
217,988 Paid Circulation
6 Annual Issues
Nature Observation
Male 58%
18-34 Years of Age 40%
Household Income $50,000+ 34%
Classified Ad Section
Canada 93%, United States 3%, Foreign 4%
Canadian Geographic offers spectacular photography and informative articles, focusing primarily on Canada's natural splendor, its people, its wildlife as well as addressing environmental concerns.

Canadian Adventures Program Guide

This is a new program currently offered through Canadian Airlines. A selection of outdoor adventure operators have been selected by Canadian Airlines and are promoted through the Canadian Adventures Guide. The activities offered include from hiking, hunting, rafting and cycling, and represent both Alberta and British Columbia operations. Canadian Airlines is currently targeting California in 1990 and plans to target Europe in 1991.

ACCESSING MARKETS THROUGH THE TRAVEL TRADE

Similarly to the booking agents, tour wholesalers act as a link between the guide outfitter and potential non-hunting customers. Wholesalers operate on a commission basis and some will ask for an annual fee as well. In recent years the number of wholesalers specializing in outdoor products has increased dramatically. The larger and more successful wholesalers are based near the market source and are the ones most familiar with the client's travel habits. Utilizing wholesalers is an effective way of reaching the long-haul market. However, similar to booking agents, wholesalers do have negative and positive aspects, and guide outfitters should research thoroughly those wholesalers prior to working with them.

ACCESSING TRAVEL AGENTS

Unlike the hunting product, the non-hunting product clientele in some situations will book their product through a travel agent, although the number percentage of clients using travel agents is low. Over the past few years the sophistication of the travel agency industry has increased and as a result there is new technology where travel agents can access through a computer system a variety of outdoor products. There are specialty companies which have established these outdoor travel data bases systems where travel agents can access them. The following is a brief description of three such companies.

- Official Recreation Guide - Applied Information Services
  100 - 2nd Street East
  Whitefish, Montana 59937

  This organization is part of the Sable Travel Network which is administered by American Airlines, and is one of the largest on-line date bases available to travel agents and other travel planners. The services offered enabled travel agents to access 85,000 leisure vacation and adventure opportunities. It also provides the agent with the ability to make reservations, receive confirmations, order brochures, and communicate directly with the suppliers. The cost to be listed in this system ranges from $350 to $1200 depending on the amount of information and the services desired.

- Ultran - Ultimate Escape Adventure Travel Network
  1685 West Uintah Street, Suite 200
  Colorado Spring, Colorado 80904

  This data base company is oriented to adventure travel product worldwide. The data base is made available to on-line travel agents and consumers within the U.S. and Canada. Suppliers pay a minimum 10% commission and there is no listing fee. If agents book through this system the commission rate may be as high as 24% where 10% goes to Ultran, 10% to the travel agent and 4% to the computer network system.

- Adventure Atlas APODEL Inc.
  P.O. Box 1049
  Delmar, California 92014

  Adventure Atlas is a data base of approximately 1200 adventure travel products classified by 10 trip categories and covering about 100 countries. The date base provides information but does not service the reservation.

ANNEX B

DRAFT WORKSHOP MATERIALS

ANNEX B
DRAFT WORKSHOP MATERIALS
OUTLINE

Introduction

What is Product Development?

- The Guide Outfitter Product
- Market Driven Product Development

The Steps in Product Development

Where Am I Now?

- Current Performance
- Market Analysis
- Product Analysis

Where Would I Like To Be?

- Possible Product Opportunities
- Possible Market Opportunities

How Do I Get There?

- Putting the Plan Together
- Cost Estimates and The Capital Budget

Is the Plan Feasible?

- Risk Analysis
- Other Information Sources

How Do I Finance It?

- Applying For a Loan
- Other Information Sources

Financial Analysis: Is it a Good Investment?

Existing Market Profile

	Hunting and Non-Hunting Markets		Hunting Only	
	Average %	How does My Operation Compare	Average %	How does my Operation Compare
Orgin				
British Columbia	9	—	2	—
Alberta	7	—	1	—
Other Canadian	1	—	1	—
Canada	17	—	4	—
Washington	11	—	15	—
Oregon	7	—	7	—
California	11	—	9	—
Mid U.S.	17	—	25	—
East U.S.	20	—	25	—
U.S.	66	—	81	—
Germany	6	—	7	—
Rest Europe	6	—	7	—
Pacific	5	—	1	—
Overseas	17	—	15	—
Demographics				
Age				
Under 20	7	—		
20-34	16	—		
35-54	56	—		
55 and over	21	—		
Sex				
Male	82	—		
Female	18	—		
Party Composition				
Singles	50	—		
Couples	18	—		
Families	16	—		
Groups	16	—		

Product Assessment Checklist - Hunting

Product Factor	Availability	Existing Market Needs & Expectations			Target Market (s) Needs & Expectations		
		Product Description	Quality Rating	Options for Improvement	Product Description	Quality Rating	Options for Improvement
1. **Accommodation** ❑ Base Facilities – lodge							
– cabins							
– tents							
❑ Satellite Facilities – cabins							
– tents							
2. **Facilities / Services** – packing / riding animals							
– boats							
– airplane							
3. **Resource Base Potential** ❑ Hunting (list species) –							
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Product Assessment Checklist Hunting (continued)

Product Factor	Availability	Existing Market Needs & Expectations			Target Market (s) Needs & Expectations		
		Product Description	Quality Rating	Options for Improvement	Product Description	Quality Rating	Options for Improvement
4. Pricing/Packaging							
– single species							
– combined hunt							
5. Service Quality							
– interpretation level							
– guide / assistant guide skills							
6. Key Factors Markets							
– natural / scenic beauty							
– remoteness							
– experience quality							
– Variety/number of animals							

Note:
1. Availability - do you have/offer item
2. Description - eg. no. of units/capacity for activity, etc.
3. Quality rating - use any scale approach such as
   1 - highest
   •
   •
   •
   5 - lowest
4. Options for improvement - is it possible, within your control?

Product Assessment Checklist - Non-Hunting

Product Factor	Availability	Existing Market Needs & Expectations			Target Market (s) Needs & Expectations		
		Product Description	Quality Rating	Options for Improvement	Product Description	Quality Rating	Options for Improvement
1. **Accommodation** ❑ Base Facilities – lodge							
– cabins							
– tents							
❑ Satellite Facilities – cabins							
– tents							
2. **Facilities / Services** – packing / riding animals							
– boats							
– airplane							
3. **Resource Base Potential** ❑ Non- Hunting – lake fishing							
– river fishing							
– canoeing / kayaking							
– hiking							
– wilderness excursions							
– trail riding							
– nature observation / photography							
– cross-country skiing							

Product Assessment Checklist Non-Hunting (continued)

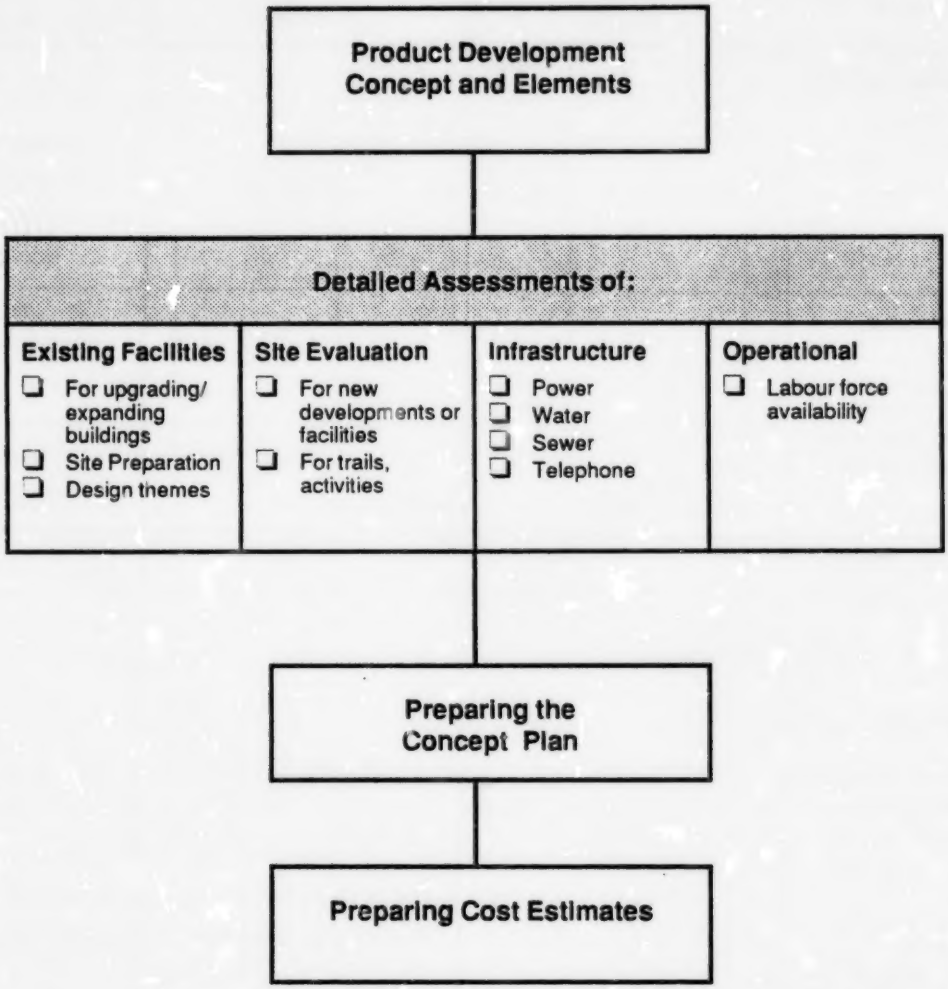
Product Factor	Availability	Existing Market Needs & Expectations			Target Market (s) Needs & Expectations		
		Product Description	Quality Rating	Options for Improvement	Product Description	Quality Rating	Options for Improvement
4. Pricing/Packaging							
– weekly packages							
– weekend packages							
– price levels							
5. Service Quality							
– interpretation level							
– guide / assistant guide skills							
6. Key Factors from Markets							
– natural / scenic beauty							
– remoteness							
– experience quality							

Note:
1. Availability - do you have/offer item
2. Description - eg. no. of units/capacity for activity, etc.
3. Quality rating - use any scale approach such as
   1 - highest
   •
   •
   •
   5 - lowest
4. Options for improvement - is it possible, within your control?

Defining a Product Development Concept

	Existing Market	Target Market #1	Target Market #2
A. Market characteristics ❑ size growth potential ❑ demographics ❑ party size ❑ origin ❑ travel mode ❑ etc.			
B. Market needs and expectations ❑ factors important in selecting experience ❑ preferred length of stay ❑ special needs (eg. for children) ❑ package preference			
C. How does our product match up? ❑ **Strengths** ❑ **Weaknesses**			
D. How strong is the Competition? ❑ which markets do they serve ❑ how do they package their product ❑ how do we distinguish our product			
E. What should our market niche be? (setting targets) ❑ based on our product strengths, and match to target market ❑ taking into account the competition			
F. What product development concept should we follow? What are the elements of this concept? ❑ to address product weaknesses			

Putting the Product Development Plan Together



PRO FORMA INCOME STATEMENT

	Year					
	current	1	2	3	4	5
No. of beds - Base - Satellite % Utilization - Hunting - Non-hunting **Average Cost Per Day** High end hunt Low end hunt Non-hunt						
A. Revenue/Sales Hunting packages Non-hunting packages **Total revenue**						
B. Variable Expenses Salaries/wages Supplies, inventory Repairs and maintenance Administration and general Marketing/advertising **Total variable expenses**						
C. Income Before Fixed Charges (A-B)						
D. Fixed Expenses Property taxes/insurance Interest charges Depreciation **Total fixed expenses**						
E. NET INCOME BEFORE TAXES (C-D)						
F. Income tax						
NET INCOME AFTER TAXES (E-F)						